DRAFT DETERMINATION RESEARCH 2024

Main Survey – Final report

Prepared for **CCW** and **Ofwat**
Prepared by **Impact Research**

October 2024

CCW
The voice for water consumers
Llais defnyddwyr dŵr

IMPACT
FROM INSIGHT TO INFLUENCE

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EXECUTIVE SUMMARY

England & Wales:

Household finances

42% of billpayers struggled to pay at least one household bill in the past year, either sometimes, most of the time, or all the time.

1 in 5 currently find it quite or very difficult to manage their finances.

Looking to 2030, 36% of billpayers think their household finances will get worse by then and 29% think they will be better.

Water bill affordability

45% find their current water bill easy to afford - this falls to 26% for proposed water bills.

18% find their current water bill difficult to afford; this increases to 40% for the proposed bill.

Billpayers who would not find the proposed bills easy to afford were asked what they would do to help pay for the increase in their water bills. Most would spend less on non-essentials (54%) or use less water (43%).

Acceptability of investments

75% find the investments acceptable, with the most commonly cited reasons being that the proposals focus on the right services (45%) and support for the longer term (33%).

However, when billpayers consider the proposed bill changes, acceptability goes down from 75% to 58%.

Wales:

Household finances

45% of billpayers struggled to pay at least one household bill in the past year, either sometimes, most of the time, or all the time.

In Wales, significantly more struggle (20% vs. 16% total) most of the time or all the time.

1 in 5 billpayers in Wales currently **find it difficult to manage their finances;** this is in line with the combined results for England and Wales.

Looking to 2030, 40% of billpayers in Wales think their household finances will get worse by then, slightly, but not significantly higher than views across England and Wales (36%).

Water bill affordability

43% find their current water bill easy to afford - this falls to 23% for proposed water bills (both similar to England and Wales combined).

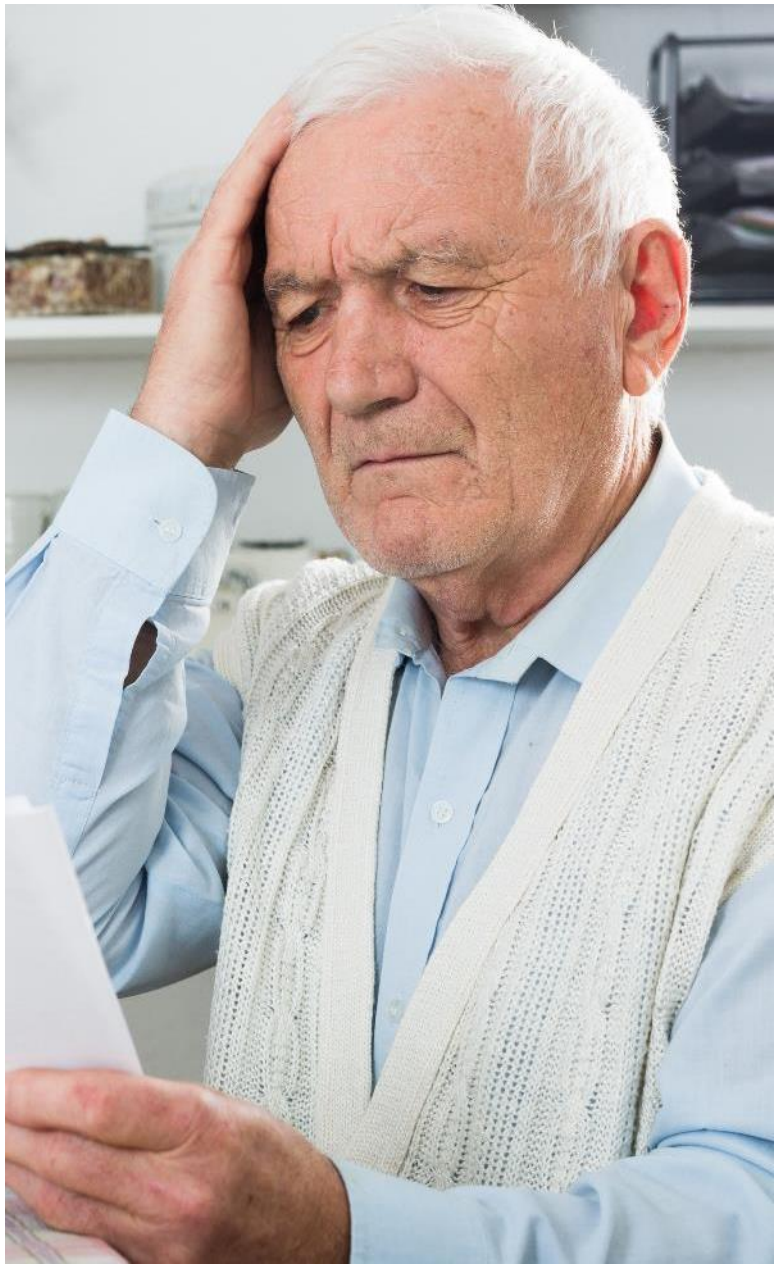
20% find their current water bill difficult to afford; this increases to 48% for the proposed bill which is significantly higher than for England and Wales combined.

Those who would not find the proposed bills easy to afford were asked what they would do to help pay for the increased water bill. **Most would spend less on non-essentials (57%), or on food shopping and essentials (44%), the latter being significantly higher than England and Wales combined.**

Acceptability of investments

75% of billpayers in Wales found the investments acceptable, with the most commonly cited reasons being that the proposals focus on the right services (45%) and support for the longer term (33%).

However, when billpayers consider the proposed bill changes, acceptability falls from 75% to 52%, significantly lower than for England and Wales combined (58%).



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RESEARCH & METHODOLOGY OVERVIEW

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FROM INSIGHT TO INFLUENCE

Survey objectives

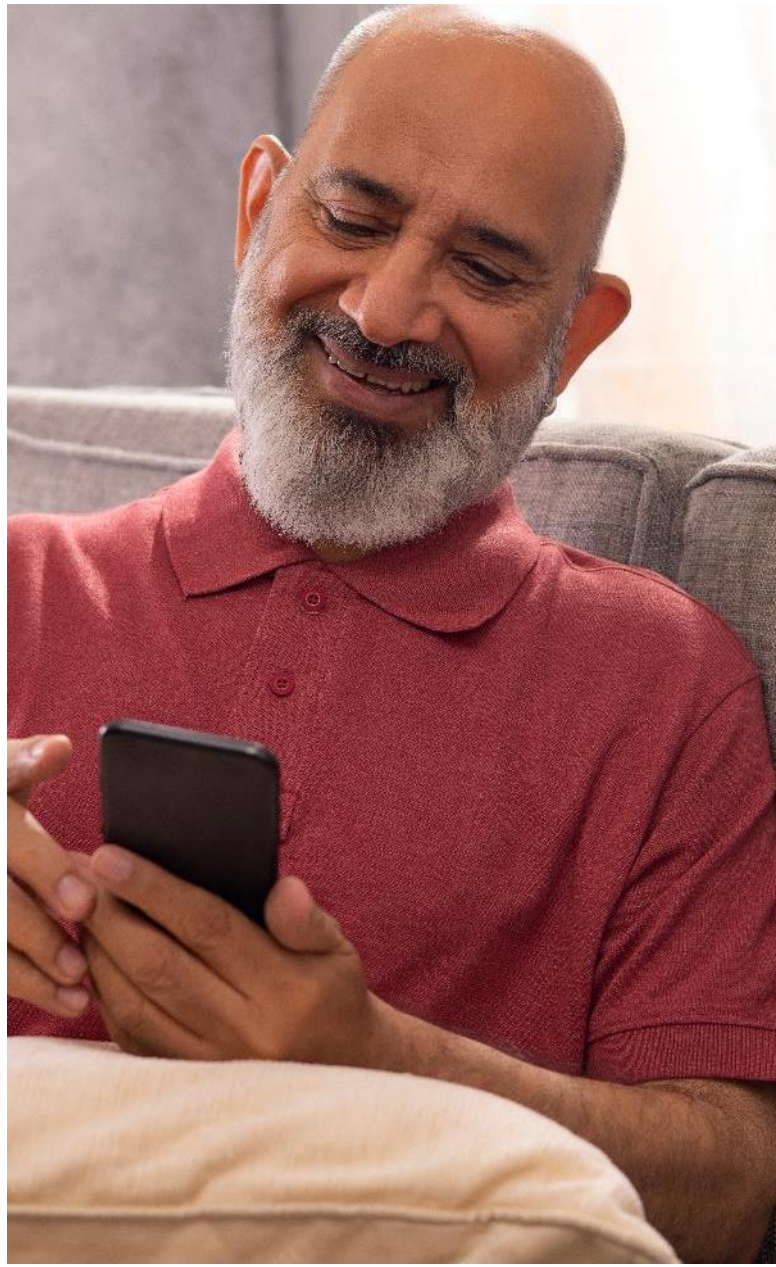
The primary purpose of the research is to gauge the opinions of water companies' customers about Ofwat's Draft Determinations, published in July 2024.

The research aims to determine:

- Affordability of current household water bills and proposed 2025 – 2030 bills.
- Acceptability of proposed service levels and investments and determine which investment areas are more important to customers.
- Where views in the nations of England and Wales are different to the total combined view across England and Wales.
- Identification of water companies which are outliers from the total combined view across England and Wales.
- Additionally, this research aims to compare these Draft Determination results to the Business Plan research conducted by each water company as set out in the Affordability and Acceptability research guidance.

Research approach

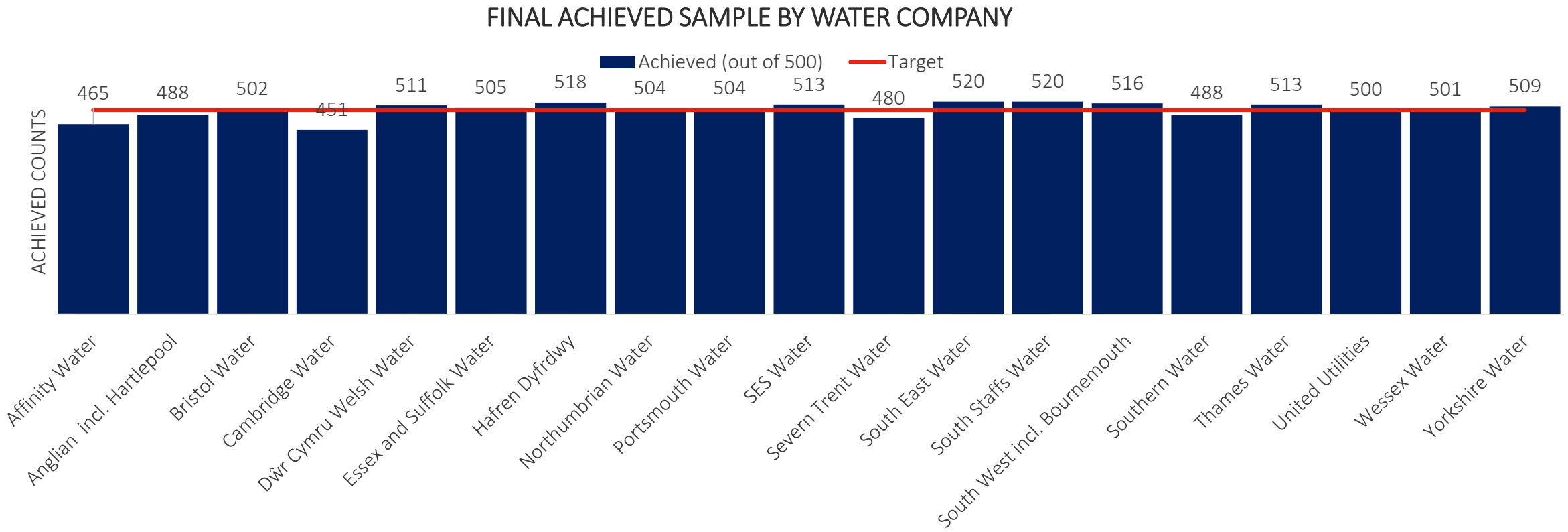
RESEARCH TYPE:	**An online quantitative survey** with an option to participate through a paper questionnaire.
TARGET:	A **representative sample of water billpayers** (who are at least jointly responsible) in **England and Wales aged 18+**. Participants must be customers of the water company being researched and aware of who their supplier is. Industry exclusion was applied.
SAMPLE SOURCE:	The sample is drawn from two sources: **online panels** managed by Prodege and **customer databases from each water company.**
SAMPLING METHOD:	Online panel participants were invited via email invite. The customer database was contacted through '**push-to-web**' approach – either emails or postal letters with a survey 'push-to-web' link.
SAMPLE MODE SPLIT:	64% through the online panel, 31% push-to-the web through an email invite, 4% push-to-the web through postal letter invite, 0.1% postal.
QUESTIONNAIRE:	**15 minutes long on average**, available in two languages: English and Welsh*. The questionnaire was tested before the main launch through cognitive interviews and a pilot survey to ensure clarity, relevance, and effectiveness in capturing accurate responses from participants.
FIELDWORK DATES:	Data was collected from 1st August 2024 to 26th September 2024.



* 5 participants opted to take the survey in the Welsh language.

This final report includes 9,508 billpayers across 19 water companies. It delivers a statistically robust sample at a water company level, ranging from 451 to 520 surveys per water company.

The total sample covers 8417 interviews in England and 1029 in Wales.



Each company sample is representative of gender, age and social grade based on census data.

The data was weighted to accurately represent the distribution of customers across all water companies in England and Wales, using **household connection figures.**

For each company, the sample was then weighted to match the 2021 census profile for **gender, age and socio-economic group** (SEG).

Additional analysis found that there was a difference in responses from the online panel sample and the push-to-web sample around the affordability of bills, over and above variations in demographics. **The general effect of push-to-web vs. panel was to lower the proportion of customers saying that affording their bill was 'easy''.***

We therefore applied a further level of weighting to adjust the proportion of survey mode (panel vs. push-to-web) within each company, to approximate as closely as possible the mix of these two modes over the whole sample.

Detailed target, unweighted & weighted demographic profiles can be found in the Appendices.

Weighting strata

Water / Wastewater companies	23 combinations
Gender	Male / female
Age	18-34 35-64 65+
SEG	ABC1 C2DE
Mode of survey	Panel Push-to-web

* The effect could also be due to the push-to-web sample seeing a personalised bill, whereas the online panel sample saw an average household bill.

Analysis & terminology

Analysis:

All reported **base sizes are unweighted**, **all % reported are weighted.**

Significance testing (on a 95% confidence level) has been applied **to compare vs. the total figure for England and Wales combined.**

The margin of error e.g., 50%:
England +/-1.1%, Wales +/- 3.1%, water company +/- 4.4% (assuming base of 500)

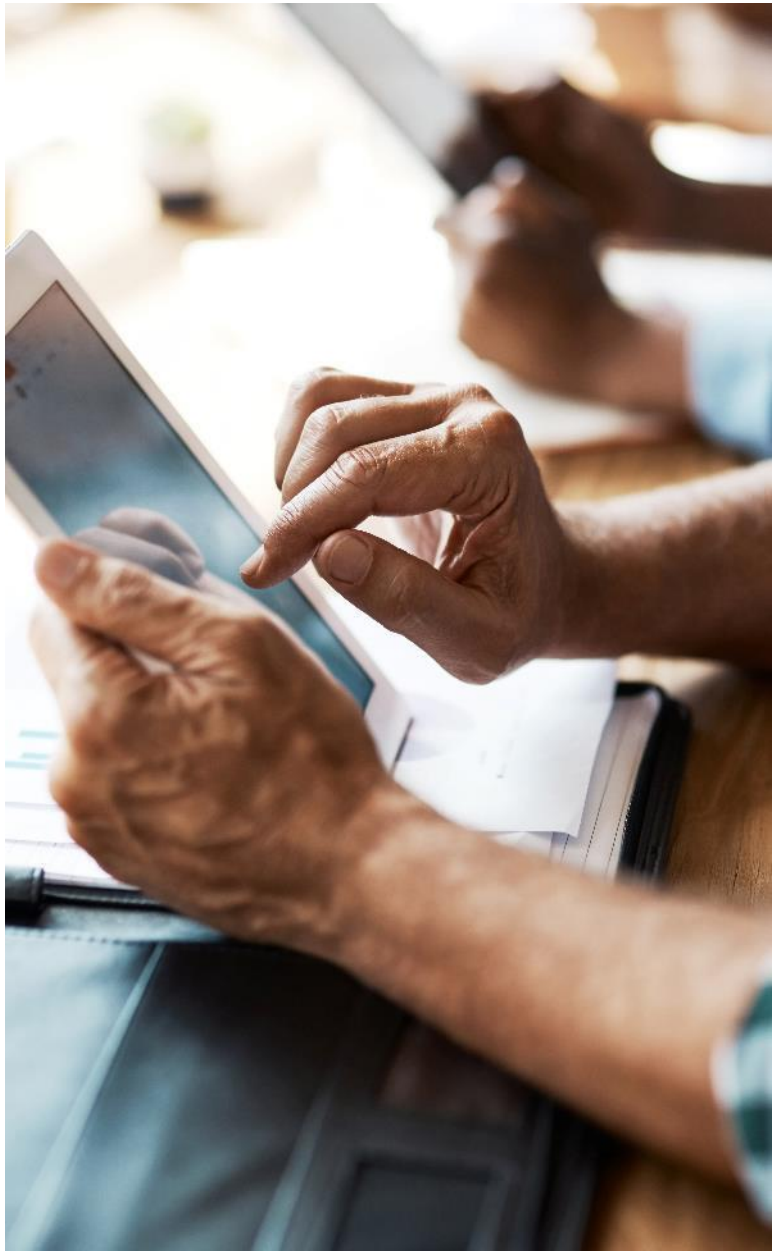
Key **scale questions** e.g., affordability, have been **netted** for simplicity. E.g., very easy & quite easy have been combined into **NET easy.**

When referring **'water bills'**, it includes sewerage charges as well.
When referring to **Total**, this means England and Wales combined.

Stimuli presented to participants:

1. 2024-25 to 2029-30 **bill profile chart**
2. Water company **performance tables and charts**
3. **Investment areas**

Examples of what people saw are included at the beginning of the relevant sections.
Information on how the research materials were constructed can be found in the Appendices.



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AFFORDABILITY

FROM INSIGHT TO INFLUENCE

HOUSEHOLD FINANCIAL SITUATION

Before asking about the affordability of their current, and then proposed bills, respondents were asked how they felt about their household finances and how well these were going.

Three questions were asked:

- How often over the last year, if at all, have they struggled to pay at least one of their household bills
- How well they are managing their finances
- Expectations on how household finances will change over the next few years

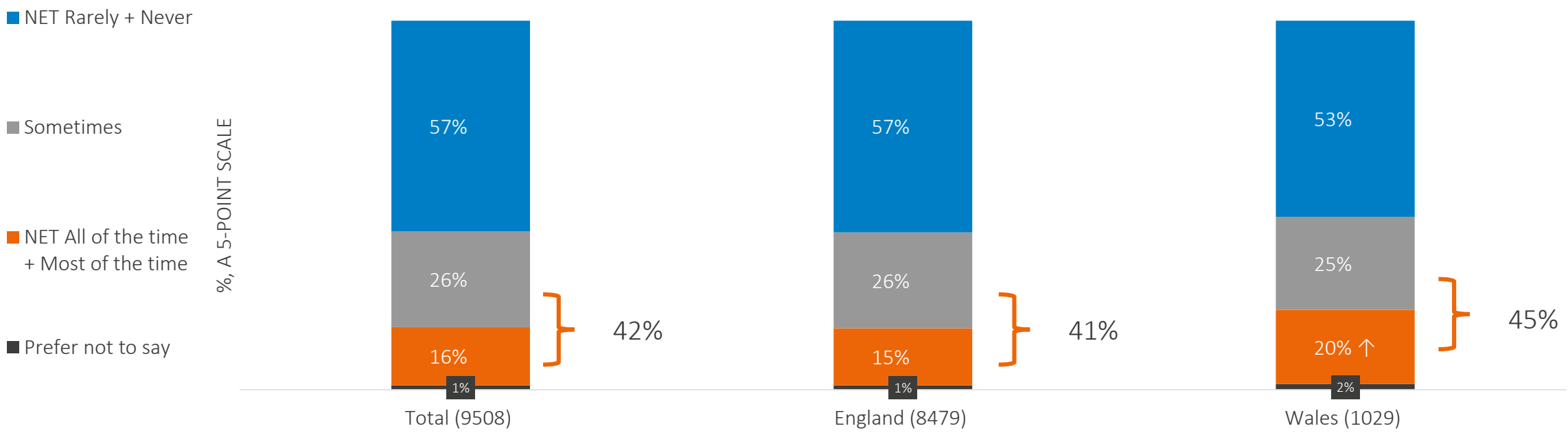
IMPACT

FROM INSIGHT TO INFLUENCE

In the last year, 42% have struggled to pay at least one of their household bills - ranging from sometimes, to most of the time, to all of the time.

Just under six in ten say they rarely or never struggled over the last year.
A significantly higher proportion of billpayers in Wales (20%) struggled to pay at least one of their household bills in the last year compared to the total for England and Wales (16%).

STRUGGLE TO PAY AT LEAST ONE HOUSEHOLD BILL BY COUNTRY



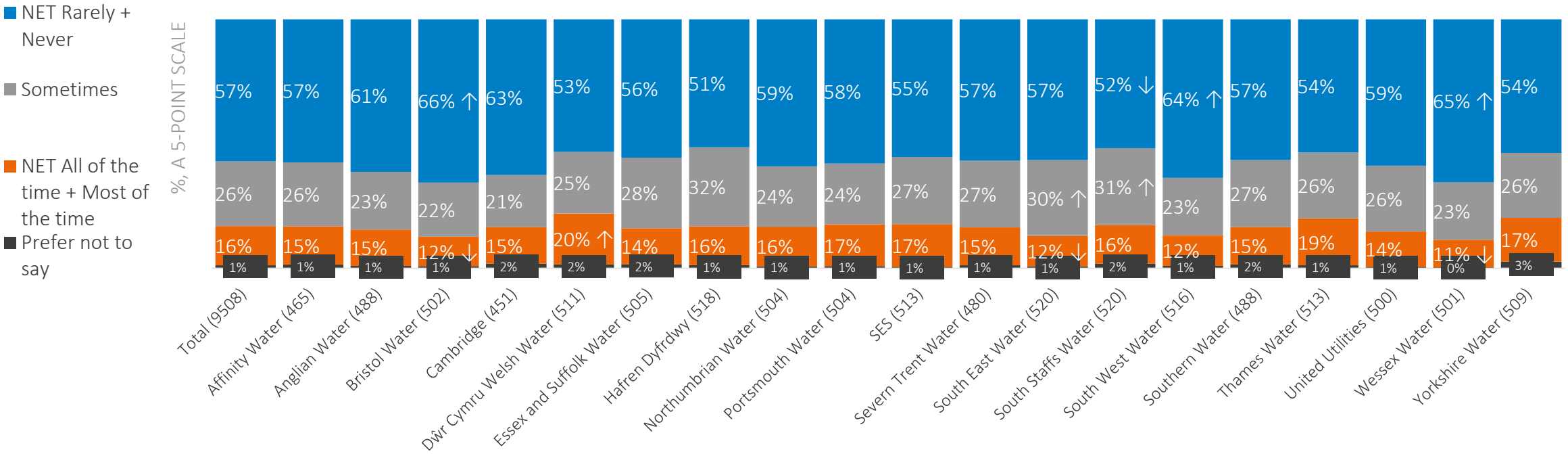
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q1 Thinking about your household's finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills? Base: ALL

Billpayers of Wessex Water, South West Water and Bristol Water were less likely to struggle with household bills in the last year.

Dŵr Cymru Welsh Water billpayers were significantly more likely to have struggled with at least one household bill in the last year, compared to England and Wales combined.

STRUGGLE TO PAY AT LEAST ONE HOUSEHOLD BILL IN THE LAST YEAR BY COMPANY



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

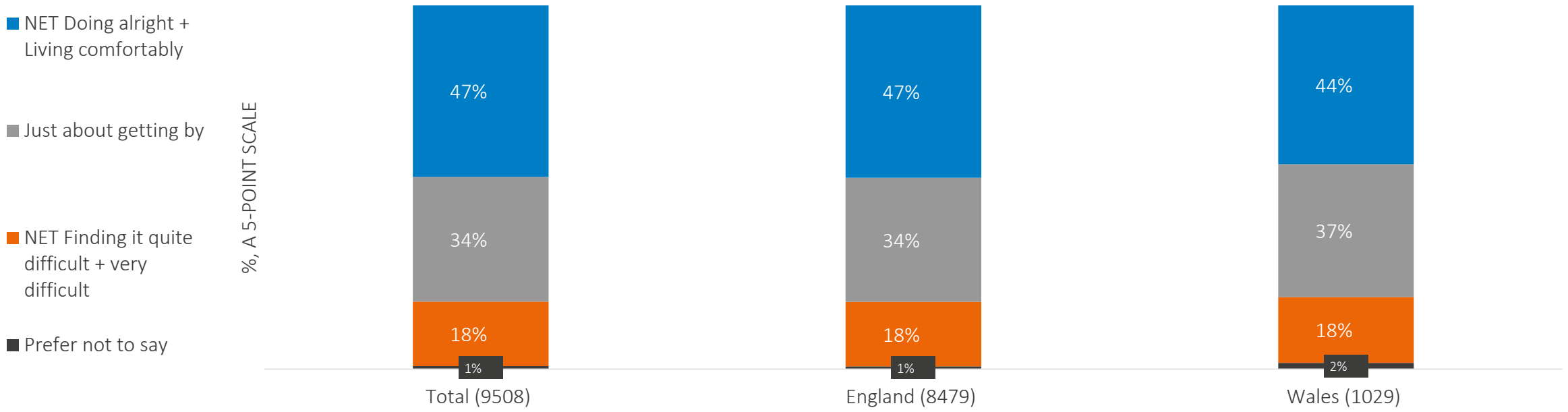
Q1 Thinking about your household's finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills? Base: ALL

About 1 in 5 billpayers currently find it ‘quite’ or ‘very difficult’ to manage financially.

Just under half are ‘doing alright’ or ‘just about getting by’. Neither country is different from the total average for England and Wales.

Those who find it difficult to manage financially are more likely to be aged 25-44, female, DE social grade or income below £15,600 to £25,999 a year. They are more likely to be other ethnicities than white British (especially Bangladeshi or white and black Africans) and have non-life stage vulnerabilities. Also, they are more likely to not have a water meter, or to be on a social tariff.

CURRENT FINANCIAL SITUATION BY COUNTRY

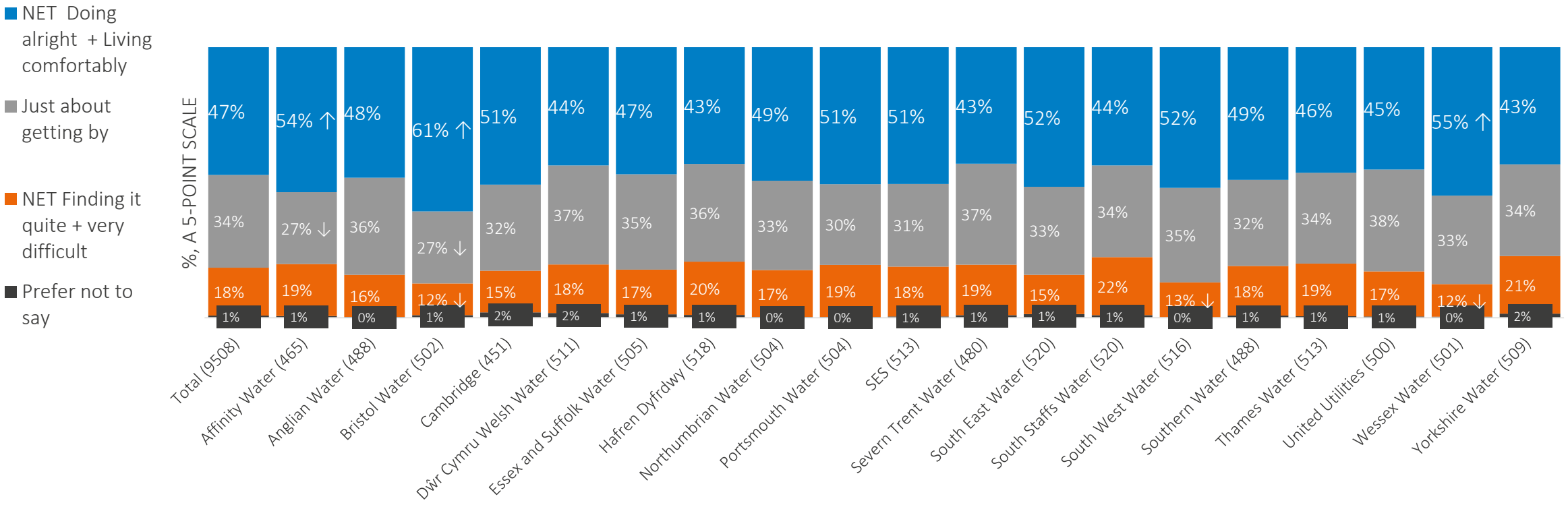


Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q2 Overall, how well would you say you are managing financially now? Base: ALL

Billpayers in Affinity Water, Bristol Water, and Wessex Water are more likely to say they are 'doing alright' and 'living comfortably' when it comes to how they are managing financially compared to the total for England and Wales.

CURRENT FINANCIAL SITUATION BY COMPANY



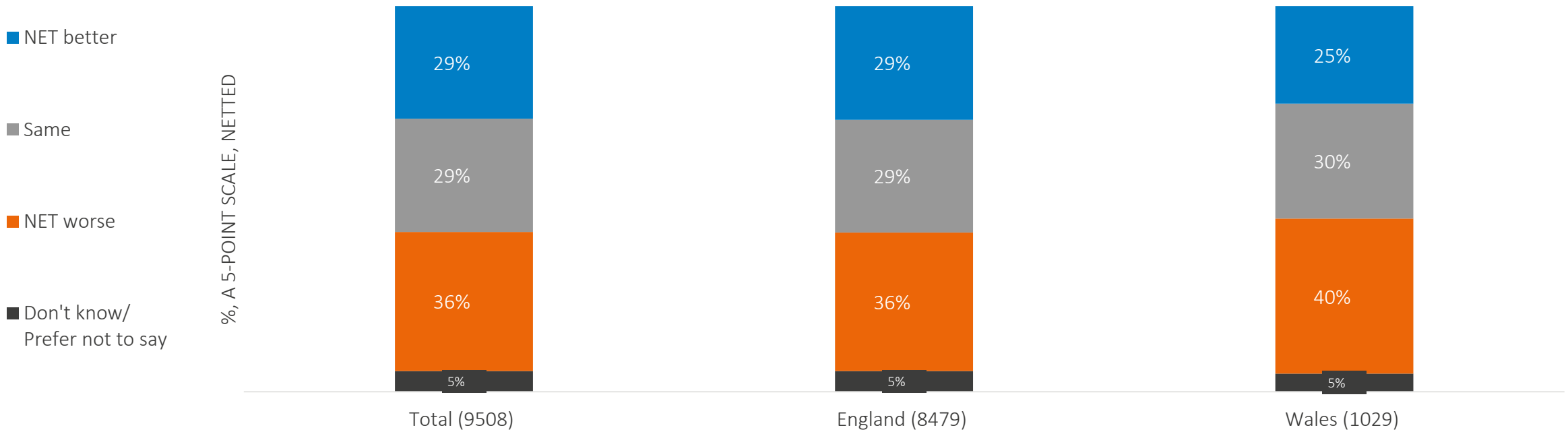
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q2 Overall, how well would you say you are managing financially now? Base: ALL

Looking to 2030, confidence in billpayers' household financial situation is mixed – nearly a third think it will get better, while a similar proportion think their finances will worsen.

Views in **England and in Wales are both similar** to the combined total.

CHANGE IN BILLPAYER FINANCIAL SITUATION BY 2030

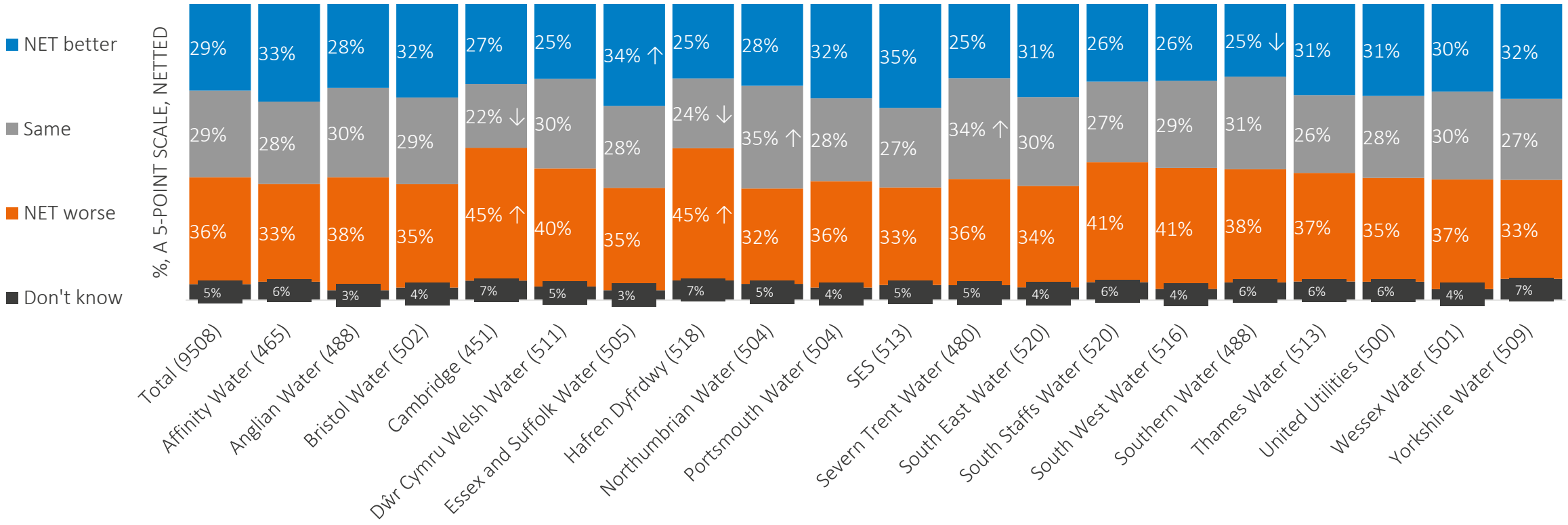


Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q3 Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get: by? Base ALL

A significantly higher proportion of billpayers in Cambridge Water and Hafren Dyfrdwy expect their finances to get worse in the next few years to 2030. Customers of Essex and Suffolk are more likely to think their financial situation will get better and those in Southern Water are less likely to think it will improve.

CHANGE IN BILLPAYER FINANCIAL SITUATION BY 2030



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q3 Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get: by? Base ALL

AFFORDABILITY OF CURRENT AND PROPOSED BILLS

After the introductory questions, participants were asked about the affordability of their current water bill, and then shown a proposed bill profile for 2025-30.

Respondents in the ‘push to web’ sample saw a bill profile based on their current bill; respondents in the online panel sample saw a bill profile based on the current household average bill. The bill profiles included forecast inflation.

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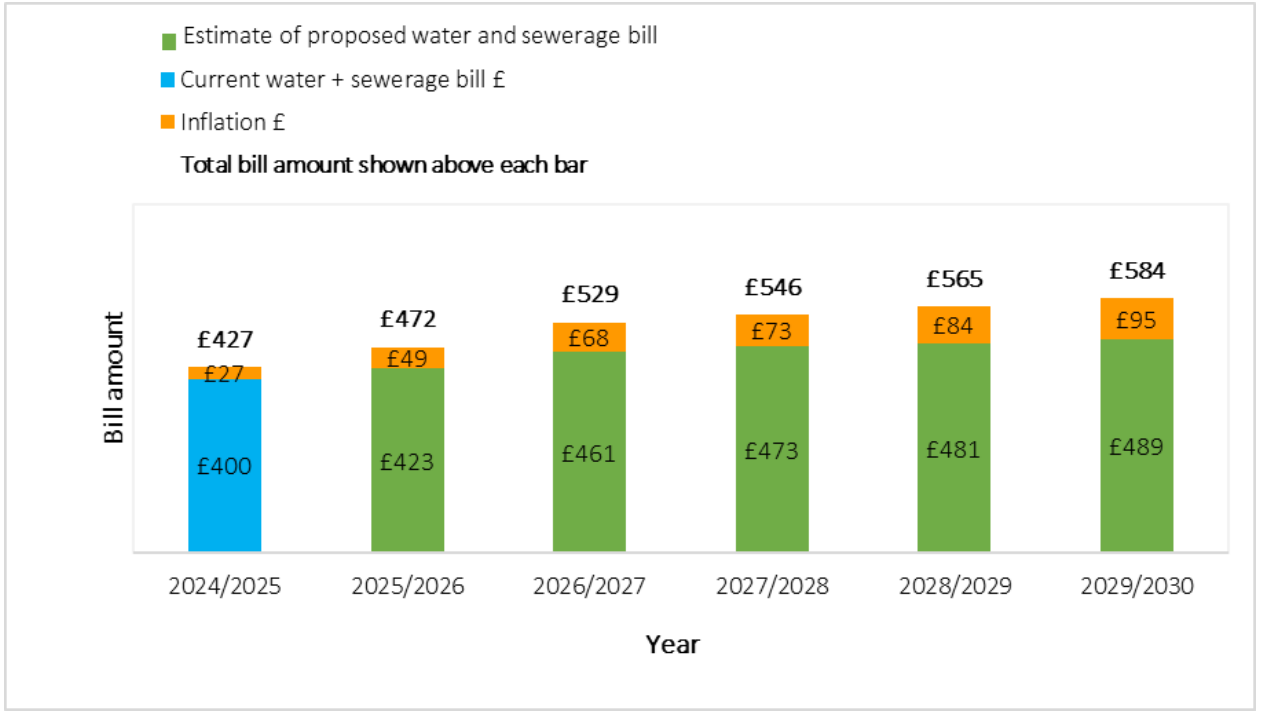
FROM INSIGHT TO INFLUENCE

Proposed water bill profile:

Each billpayer was presented with **a bill profile chart** including the current 2024/2025 and the proposed annual bill changes up to 2029/2030, and the impact of inflation.

The **panel participants** were presented with the **average household bill for their water company.**
The **push-to-web participants** were shown their **personalised bill profile** based on their current bill.
The bill was based on combined water & sewerage charges.

PROPOSED CHANGES TO YOUR WATER BILL

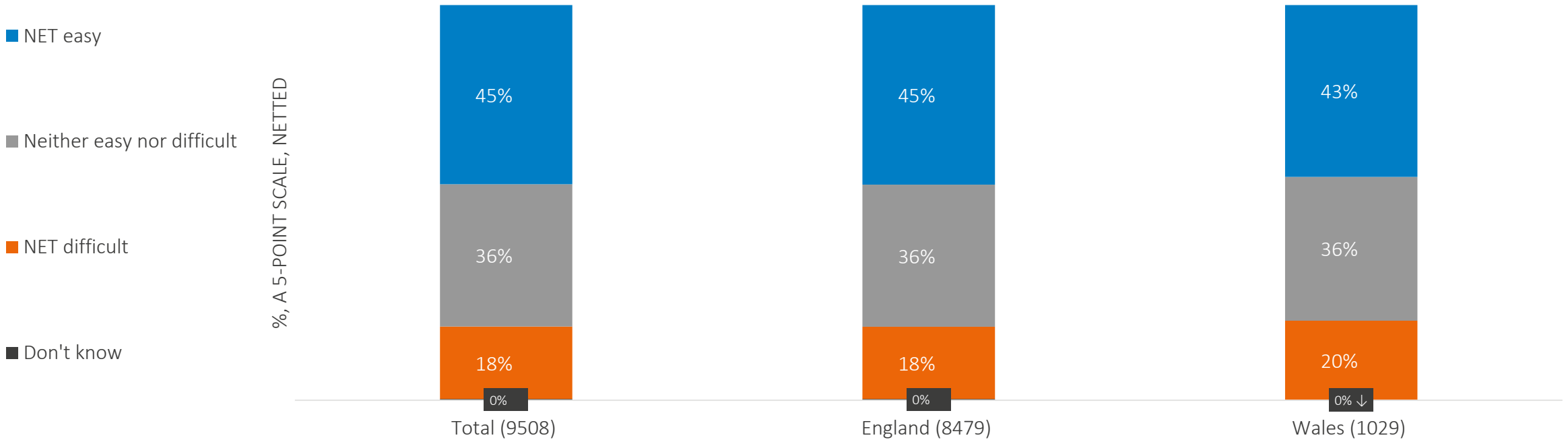


Information on how the research materials were constructed can be found in the Appendices.

45% of households in England and Wales find their current water bill easy to afford, while almost a fifth say it is difficult to afford.

Views in Wales are similar to the total for England and Wales.

CURRENT WATER BILL AFFORDABILITY BY COUNTRY



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

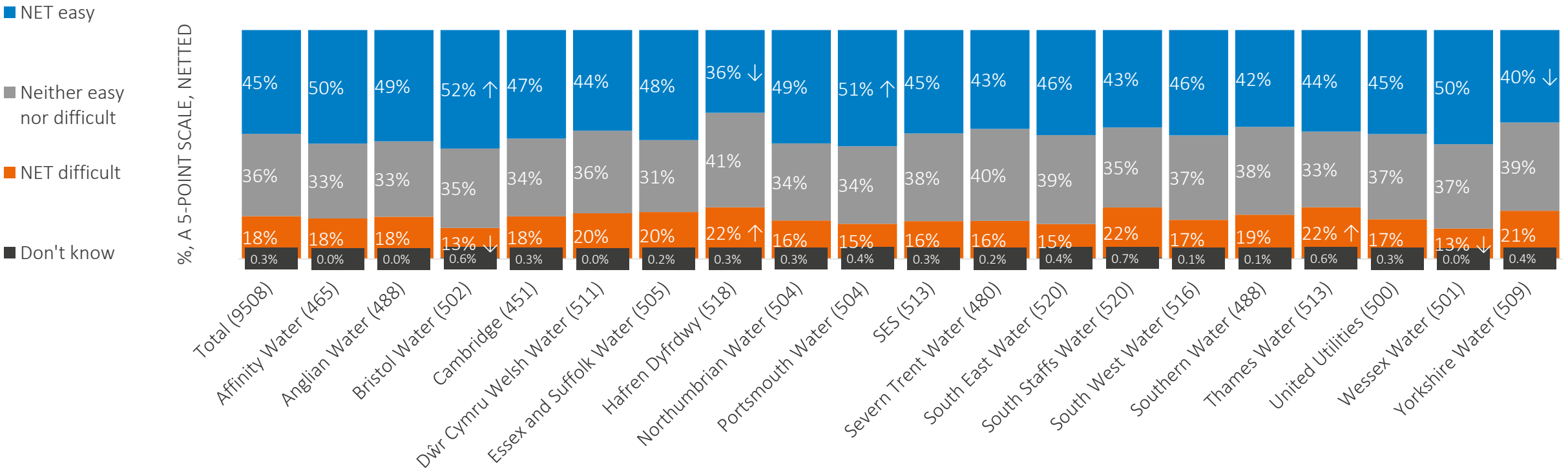
Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base: ALL

The affordability of current household water bills differs across some water companies.

Bristol Water and Portsmouth Water billpayers are significantly more likely to say their current water bill is easy to afford than the England and Wales total, and Hafren Dyfrdwy and Yorkshire Water customers are less likely to say their current bill is easy to afford.
Customers of Hafren Dyfrdwy are also more likely to say it is difficult to afford, along with those of Thames Water.
Bristol Water and Wessex Water are less likely to say their current bill is difficult to afford.

CURRENT WATER BILL AFFORDABILITY BY WATER COMPANY

The bill was based on combined water & sewerage charges.

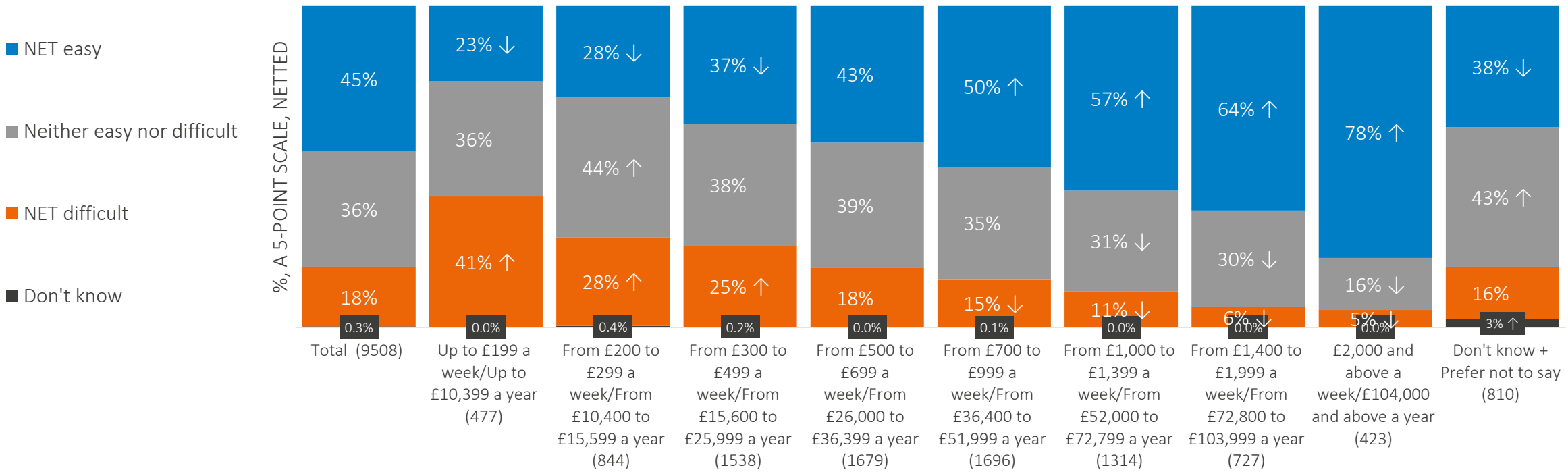


Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base: ALL

There is a correlation between affordability and household income. Respondents from lower-income households find current water bills more difficult to afford.

CURRENT WATER BILL AFFORDABILITY BY INCOME



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base: ALL

Ease or difficulty of affording to pay water bills varies among different groups of billpayers.

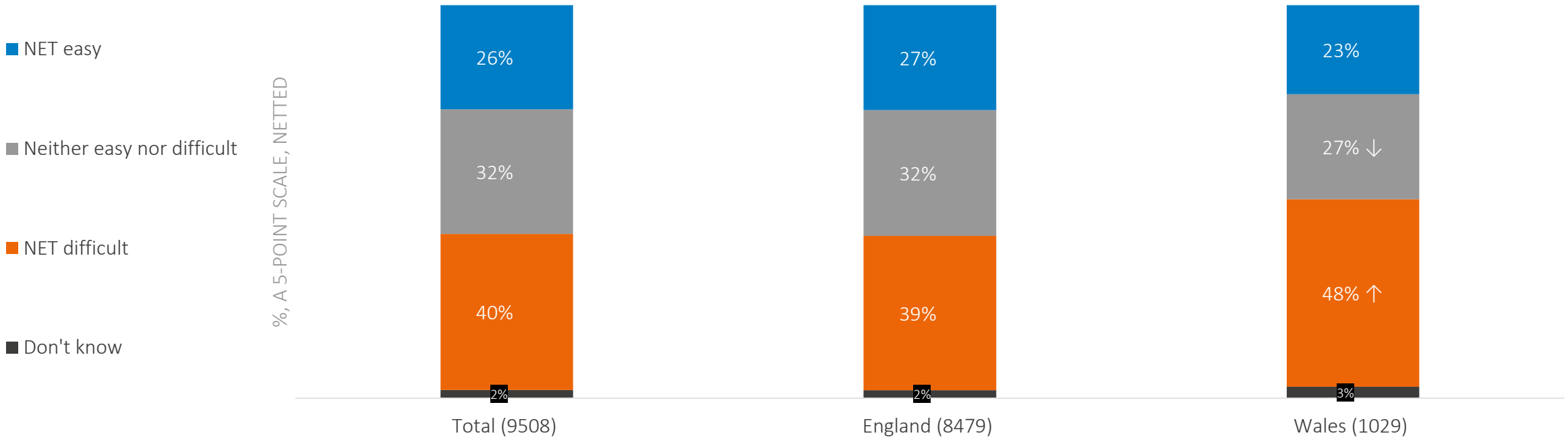
	Those who find it easy (45%) are more likely to be:	Those who find it difficult (18%) are more likely to be:
Demographics	Primarily aged 65 and above, male, or part of the ABC1 social grade.	Mostly younger individuals in the 25-44 age group. They are often female or belong to the DE social grade.
Vulnerability	Do not face any vulnerability.	Many face medical, communication, or other types of vulnerabilities, unrelated to their life stage
Income	Their weekly income ranges from £700 or higher, or annual earnings are between £36,400 or higher.	Their weekly income is below £499 a week or annual earnings are below £25,999.
Ethnicity	Predominantly White (English, Welsh, Scottish, Northern Irish, British, Irish, or other White groups).	Other than White British. A higher percentage of African, Asian, Pakistani, and Bangladeshi individuals are represented in this group.
Last year bill payments	This group has rarely struggled to afford their bills in the past year.	They have already faced challenges in paying their bills in the past year, at least on some occasions.
Financial condition & outlook	They live comfortably and describe their financial situation as at least "doing all right." Over half of them anticipate improving financial conditions for their household heading toward 2030.	This group finds their current financial situation difficult or quite difficult. A higher proportion of them anticipate worsening financial conditions for their household heading toward 2030.
Metered water	They are more likely to have a water meter installed.	They are more likely to be unmetered.
Social tariff & IMD Quintiles *	.	Are on social tariff.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base: ALL (9508)
* Directional as only some push-to-web participants were identified if on social tariff or allocated to IMD quintiles

On seeing proposed water bills for 2025-30, ‘ease’ of affordability drops from 45% for current bills to 26% for proposed; 40% say this would be difficult to afford.

Nearly half of households in Wales say the proposed bill would be difficult to afford, and they are significantly more likely to say the proposed bill will be difficult to afford compared to those in England and Wales.

AFFORDABILITY OF PROPOSED WATER BILLS BY COUNTRY



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

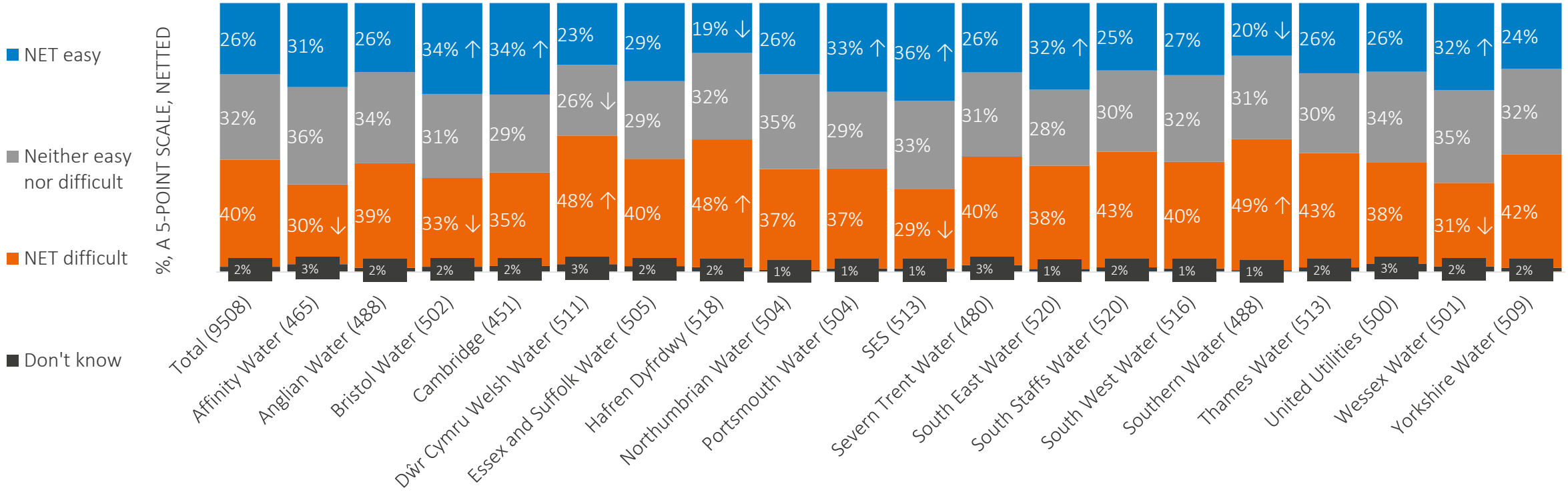
Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base: ALL

There is more variation between companies in views on the affordability of the proposed bill than for the current bill.

Affordability of proposed water bills is seen as easier for Bristol Water, Cambridge Water, Portsmouth Water, SES Water, South East Water and Wessex Water customers. Billpayers of Welsh Water, Hafren Dyfrdwy and Southern Water, find proposed bills more difficult to afford than the total for England and Wales.

AFFORDABILITY OF PROPOSED WATER BILLS BY WATER COMPANY

The bill was based on combined water & sewerage charges.



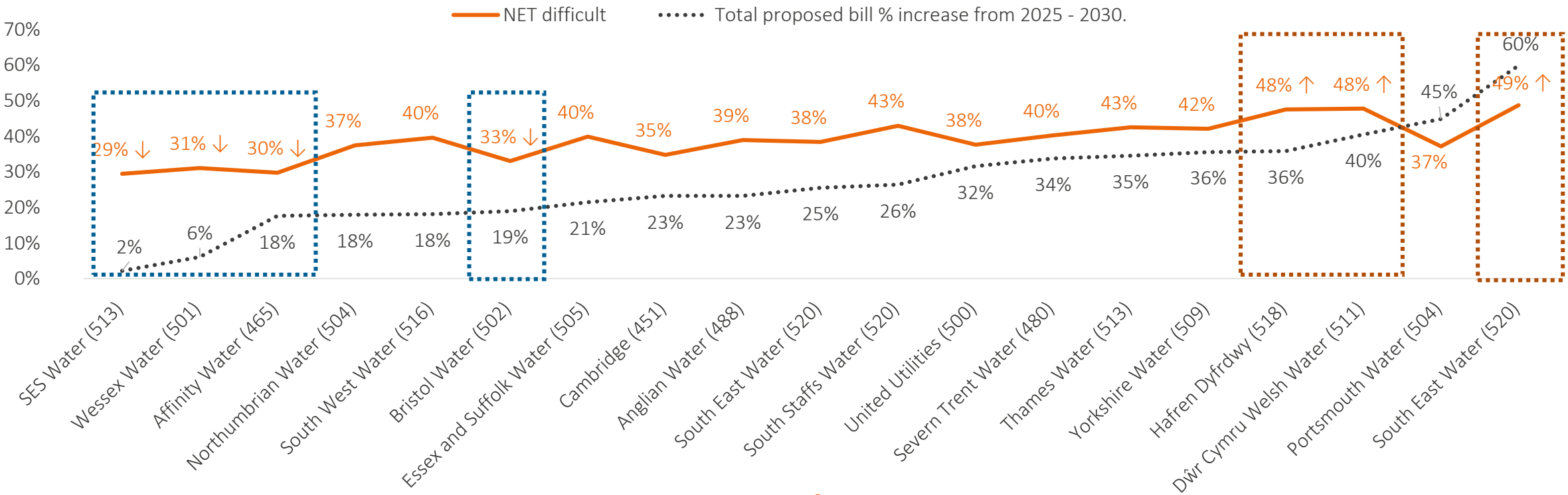
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base: ALL

We plotted scores for the difficulty of affording the proposed bill in relation to the total proposed bill % increase from 2025 to 2030 for each water company and noted some relationships.

In areas with the lowest proposed bill increase - SES, Wessex, Affinity, but also Bristol, affordability is significantly less difficult. In Hafren Dyfrdwy, Dŵr Cymru Welsh Water and Southern Water, with much higher increases, the affordability of the proposed bill is significantly more difficult.

PROPOSED TOTAL BILL INCREASE 2025-30 VS. PROPOSED BILL AFFORDABILITY



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base: ALL, EXCL DK (9334)

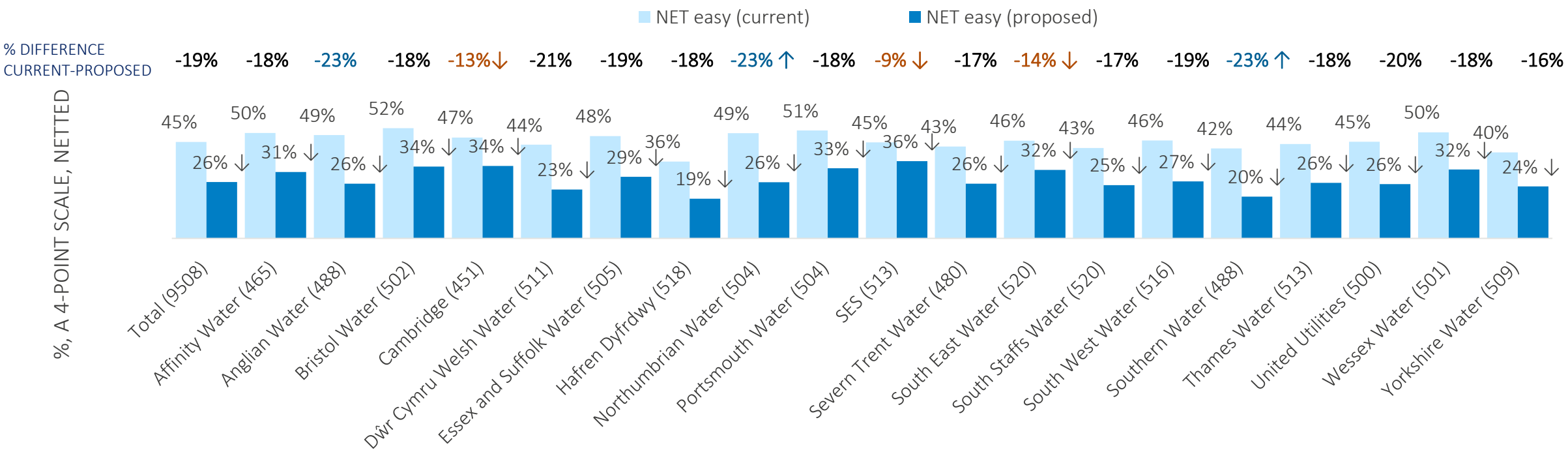
* For water companies that are serviced by multiple WASCs, for this exercise purposes, we calculated a simple average, e.g., Affinity Water + Anglian Water = 20%, Affinity Water + Thames Water = 15%; therefore, we charted a bill increase of 18%

For all companies, ease of affordability is significantly lower for proposed bills, than for current.

Companies with the most significant proportion of billpayers feeling the proposed bill will not be easy to afford compared to the current bill are Anglian Water, Northumbrian and Southern Water. The lowest difference is observed among Cambridge Water, SES Water and South East Water billpayers.

AFFORDABILITY OF CURRENT VS. PROPOSED WATER BILL

The bill included a combined water & sewerage bill.

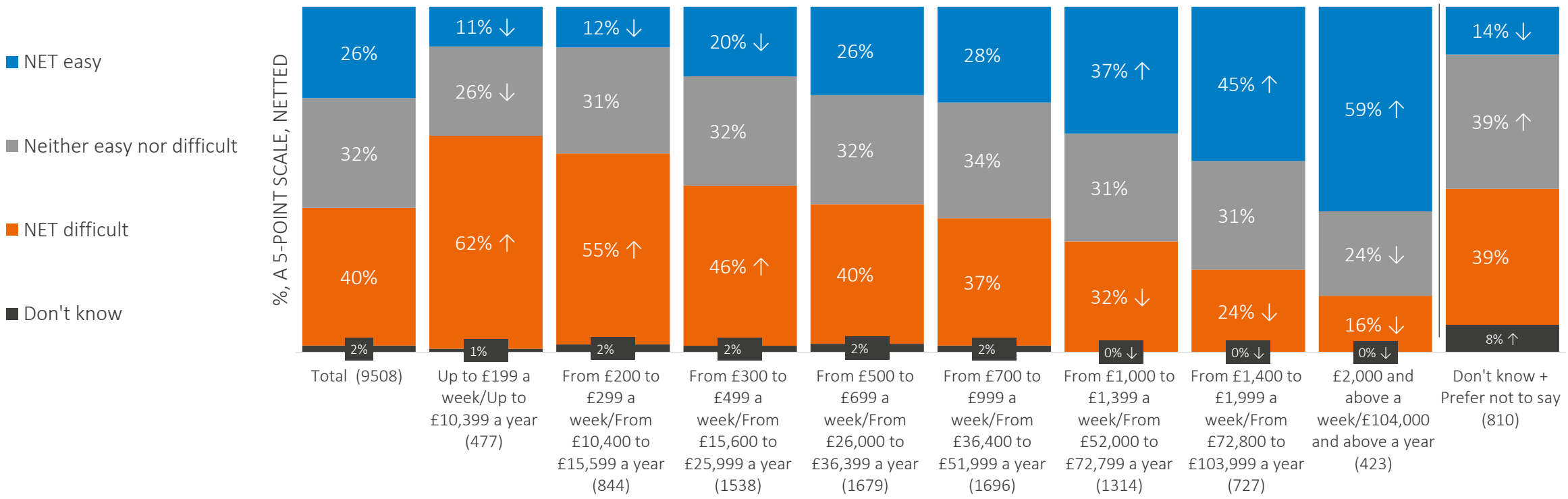


Arrows next to the numbers mark significant differences between the current & proposed affordability, ↑ = significantly greater ↓ = significantly lower, on a 95% confidence level.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base ALL (9508)
Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base ALL (9508)

Affordability of the proposed bill varies with income. Over half of billpayers with a household income below £26,000 a year will find it difficult to afford the proposed water bill.

PROPOSED WATER BILL AFFORDABILITY BY INCOME



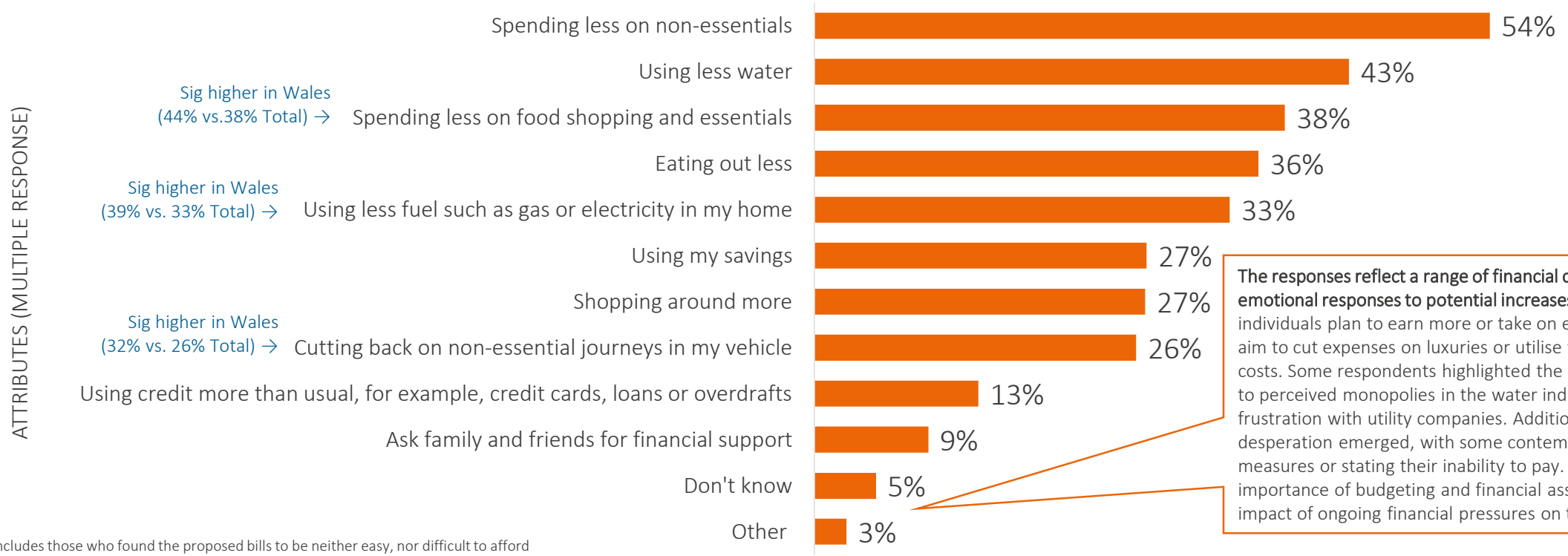
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base: ALL

The 72% of billpayers who would not find the proposed bill easy* to afford were asked what they would do to help pay for the increase in their water bills. Most would spend less on non-essentials, use less water or spend less on food and essentials.

On average, **billpayers listed three different ways of cutting back** to cover the proposed water bills.
Billpayers in Wales will be more likely to spend less on food shopping and essentials, use less fuel or cut back on non-essential journeys.

HOW WILL THEY PAY FOR PROPOSED BILL CHANGES



The responses reflect a range of financial coping strategies and emotional responses to potential increases in water bills. Many individuals plan to earn more or take on extra jobs, while others aim to cut expenses on luxuries or utilise water meters to manage costs. Some respondents highlighted the lack of alternatives due to perceived monopolies in the water industry, expressing frustration with utility companies. Additionally, themes of desperation emerged, with some contemplating extreme measures or stating their inability to pay. Others discussed the importance of budgeting and financial assistance, as well as the impact of ongoing financial pressures on their well-being and day-

* Includes those who found the proposed bills to be neither easy, nor difficult to afford

Q6 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Base: THOSE WHO FOUND THE PROPOSED BILL NEITHER, DIFFICULT OR VERY DIFFICULT TO PAY FOR (6705) / THEMATIC ANALYSIS FOR OTHER (NOT CODED)

Ways of cutting back vary slightly across water companies

Billpayers of South West Water and Thames Water are more likely to decrease their water usage.
In the Dŵr Cymru Welsh Water, more billpayers feel they will have to spend less on food shopping and essentials, use less fuel in their homes and cut back on non-essential journeys. Billpayers of Hafren Dyfrdwy or Portsmouth Water are more likely to reach out for help among family and friends.

HOW WILL THEY PAY FOR PROPOSED BILL CHANGES BY COMPANY Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	North umbrian Water	Ports mouth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	Southern Water	Thames Water	United Utilities	Wessex Water	York shire Water
Base size	6705	289	357	318	312	375	338	411	356	338	372	340	348	379	357	387	370	359	329	370
Spending less on non-essentials	54%	51%	52%	53%	54%	58%	49%	49%	53%	55%	51%	54%	57%	55%	54%	54%	53%	60% ↑	55%	53%
Using less water	43%	42%	48%	41%	42%	39%	43%	33% ↓	37% ↓	31% ↓	41%	38%	47%	37%	51% ↑	45%	49% ↑	42%	47%	38%
Spending less on food shopping and essentials	38%	32%	32% ↓	34%	35%	45% ↑	39%	41%	39%	41%	33%	37%	42%	41%	42%	41%	37%	36%	43%	39%
Eating out less	36%	33%	34%	38%	36%	36%	32%	29% ↓	37%	38%	36%	38%	31%	37%	36%	37%	37%	37%	33%	31%
Using less fuel such as gas or electricity in my home	33%	29%	33%	31%	36%	40% ↑	33%	38%	30%	34%	32%	34%	33%	32%	36%	34%	34%	32%	34%	32%
Using my savings	27%	30%	26%	27%	26%	28%	27%	27%	22%	26%	25%	29%	28%	29%	29%	23%	29%	24%	26%	22%
Shopping around more	27%	28%	21% ↓	22%	18% ↓	25%	28%	31%	25%	27%	27%	25%	28%	27%	29%	28%	27%	29%	26%	29%
Cutting back on non-essential journeys in my vehicle	26%	24%	27%	22%	23%	33% ↑	27%	25%	22%	29%	20%	31% ↑	25%	30%	28%	23%	20% ↓	26%	29%	25%
Using credit more than usual, for example, credit cards, loans or overdrafts	13%	12%	13%	12%	20% ↑	18%	13%	14%	10%	20% ↑	22% ↑	12%	16%	13%	11%	16%	13%	15%	15%	8% ↓
Ask family and friends for financial support	9%	9%	8%	9%	9%	12%	10%	15% ↑	8%	13% ↑	12%	10%	10%	9%	10%	8%	11%	7%	8%	7%
Other Please specify	3%	1%	2%	2%	2%	2%	4%	3%	2%	3%	2%	2%	4%	2%	1%	4%	3%	2%	3%	4%
Don't know	5%	6%	7%	3%	7%	6%	5%	4%	5%	3%	3%	6%	4%	4%	3%	6%	4%	3%	5%	6%

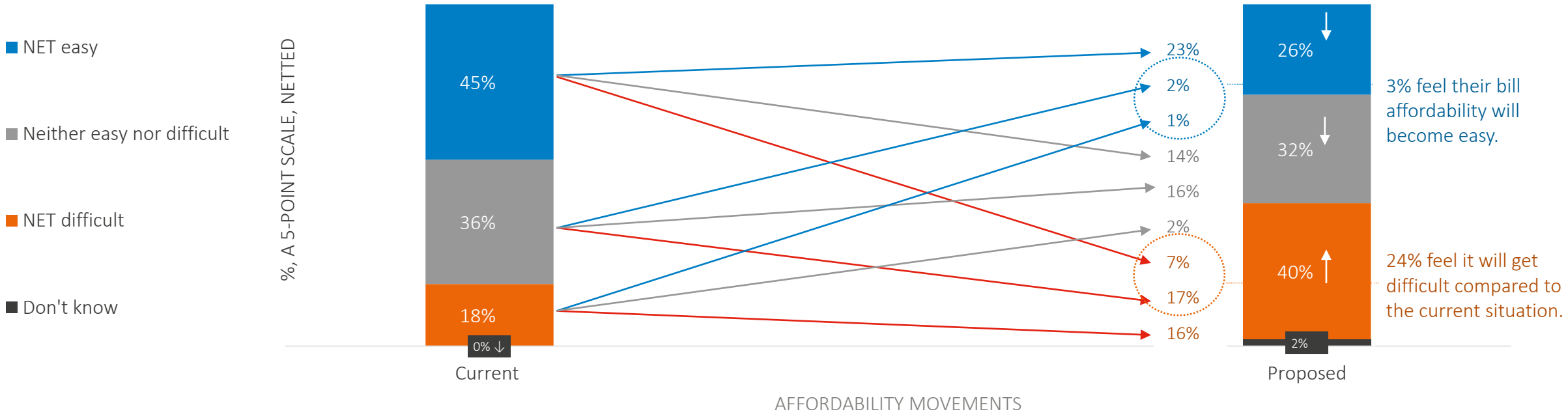
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q6 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Base: THOSE WHO FOUND THE PROPOSED BILL NEITHER, DIFFICULT OR VERY DIFFICULT TO PAY FOR (6705)

Affordability of the proposed water bill drops to 26% from the current 45%.

The drop is observed across both countries and all water companies. Out of the 45% who find current water bills easy to afford, about half (23%) say that proposed bills will also be easy to afford. However, 14% say that proposed bills would be neither easy nor difficult to afford, and 7% say they would become difficult to afford.

CURRENT VS. PROPOSED WATER BILL AFFORDABILITY MOVEMENTS



Arrows next to the numbers mark significant differences between Current & Proposed affordability, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base ALL (9508)
Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base ALL (9508)

Characteristics of those who had a different view on affordability of proposed bills, compared to current bills.

Directionally, Wales shows similar characteristics to those with different views on proposed and current affordability in England and Wales combined.

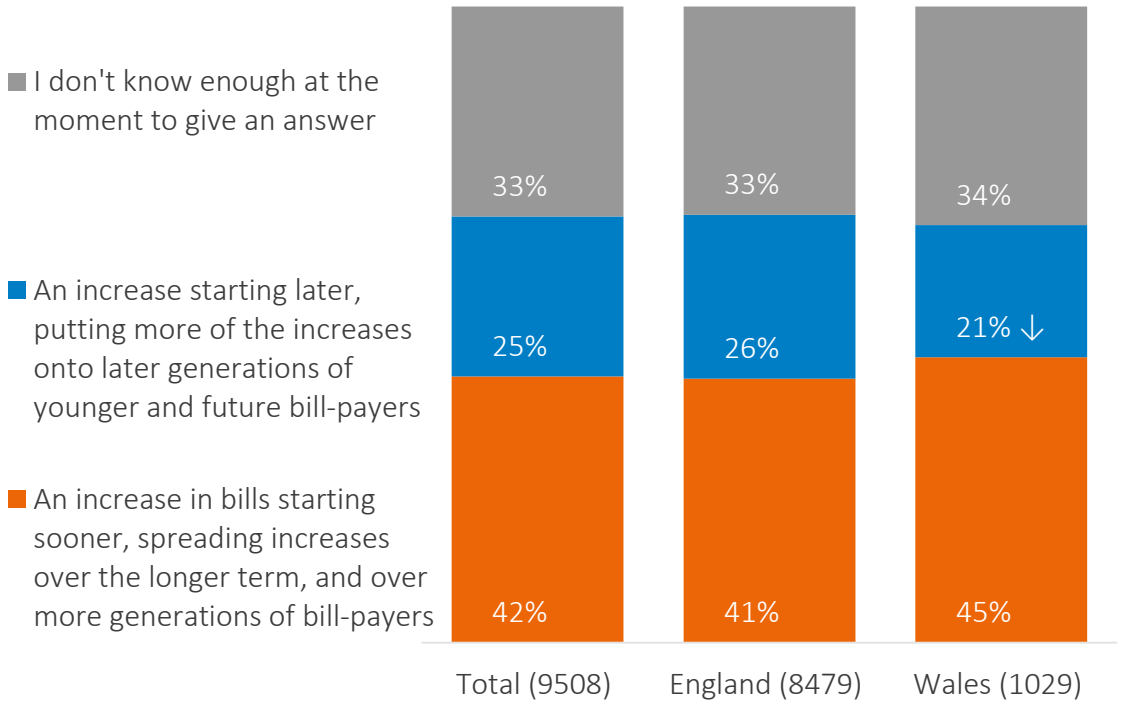
	Characteristics of the 24% who find current water bill *easy*, or *neither easy nor difficult* to afford, but the proposed water bill *difficult*. (2264)	Characteristics of the 3% who find current water bill *difficult* or *neither easy nor difficult* to afford, but the proposed water bill *easy*. (299)
Demographics	Mostly females or belong to the DE social grade.	Mostly younger age brackets below 44.
Vulnerability	Mostly among billpayers where themselves or another member of my household face medical or other vulnerability (not related to age or communication).	More so among billpayers with communication vulnerability.
Income	Below £199 £200 to £299 a week/ £10,400 to £15,599 a year.	
Ethnicity	It's more likely about the Caribbean ethnicity.	Other than white British, predominantly African or Pakistani minorities.
Last year bill payments		More among those who frequently struggled to pay at least one current bill.
Financial condition & outlook	Heading towards 2030, they feel their financial situation will worsen.	
Metered water	More likely not to be on metered water.	They are more likely to be on metered water.
Social tariff & IMD Quintiles *	More likely to be on social tariff.	Currently not on social tariff.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base ALL (9508)
Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base ALL (9508)
* Directional as only some push-to-web participants were identified if on social tariff or allocated to IMD quintiles

Billpayers were asked how they would prefer bill increases for long-term investments to be phased. 42% would prefer the bill increase starting sooner vs. 25% later. A third did not know enough to give an answer.

Billpayers in Wales are less likely to want the increase to start later than the England and Wales views.

INTERGENERATIONAL FAIRNESS



I don't know enough at the moment to give an answer:
- **Age:** 55-64
- **Gender**: Female
- **Social grade**: DE

Who wants to start later:
- **Age:** 18-24 years old
- **Gender**: Male
- **Income:** Specifically, £500 to £699 a week/ £26,000 to £36,399 a year

Who wants to start sooner:
- **Social grade:** AB
- **Income:** Higher income (> £700 to £999 a week/ £36,400 to £51,999 a year)

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q9: Water companies have to plan their services well into the future, i.e., 20-30 years from now, taking into account forecasts for things like the effect of climate change and increases in population. It can take decades for some of the things that companies build to come into service - for example, a new reservoir can take 20-30 years. There are different ways in which these long-term investments can feed into bills. In principle, which one of the following options would you prefer?
by BANNER: Country Base ALL: TOTAL (9508), ENGLAND (8479) WALES (1029)

Across all companies, more would prefer the increase to start sooner rather than later; however, the proportion differs in some water regions.

In Bristol Water, nearly half would prefer to start sooner. Whilst in Thames Water, compared to England and Wales, more billpayers would prefer spreading increases over the longer term.

INTERGENERATIONAL FAIRNESS Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	North umbrian Water	Ports mouth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	Southern Water	Thames Water	United Utilities	Wessex Water	Yorkshire Water
Base size	**9508**	465	488	502	451	511	505	518	504	504	513	480	520	520	516	488	513	500	501	509
I don't know enough at the moment to give an answer	**33%**	33%	35%	31%	30%	34%	33%	37%	35%	31%	32%	30%	32%	34%	38%	33%	30%	33%	34%	35%
An increase in bills starting sooner, spreading increases over the longer term, and over more generations of bill-payers	**42%**	43%	42%	49% ↑	39%	45%	40%	43%	38%	43%	42%	42%	43%	44%	42%	38%	39%	45%	45%	41%
An increase starting later, putting more of the increases onto later generations of younger and future bill-payers	**25%**	24%	23%	20% ↓	31%	21% ↓	27%	20% ↓	27%	26%	25%	28%	25%	23%	21% ↓	28%	31% ↑	23%	21% ↓	24%
Difference between sooner vs. later.	**16%**	18%	18%	29%	8%	24%	12%	23%	11%	17%	17%	14%	19%	21%	21%	10%	7%	22%	24%	17%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q9: Water companies have to plan their services well into the future, i.e., 20-30 years from now, taking into account forecasts for things like the effect of climate change and increases in population. It can take decades for some of the things that companies build to come into service - for example, a new reservoir can take 20-30 years. There are different ways in which these long-term investments can feed into bills. In principle, which one of the following options would you prefer?
by BANNER: Country Base ALL: TOTAL (9508), ENGLAND (8479) WALES (1029)

4

ACCEPTABILITY

Respondents were shown information about how their water company is currently performing for six service areas, before seeing proposed service levels for 2025-30.

They then saw investment proposals from 2025-30, and were asked to prioritise within these, before being asked how acceptable the proposals were.

FROM INSIGHT TO INFLUENCE

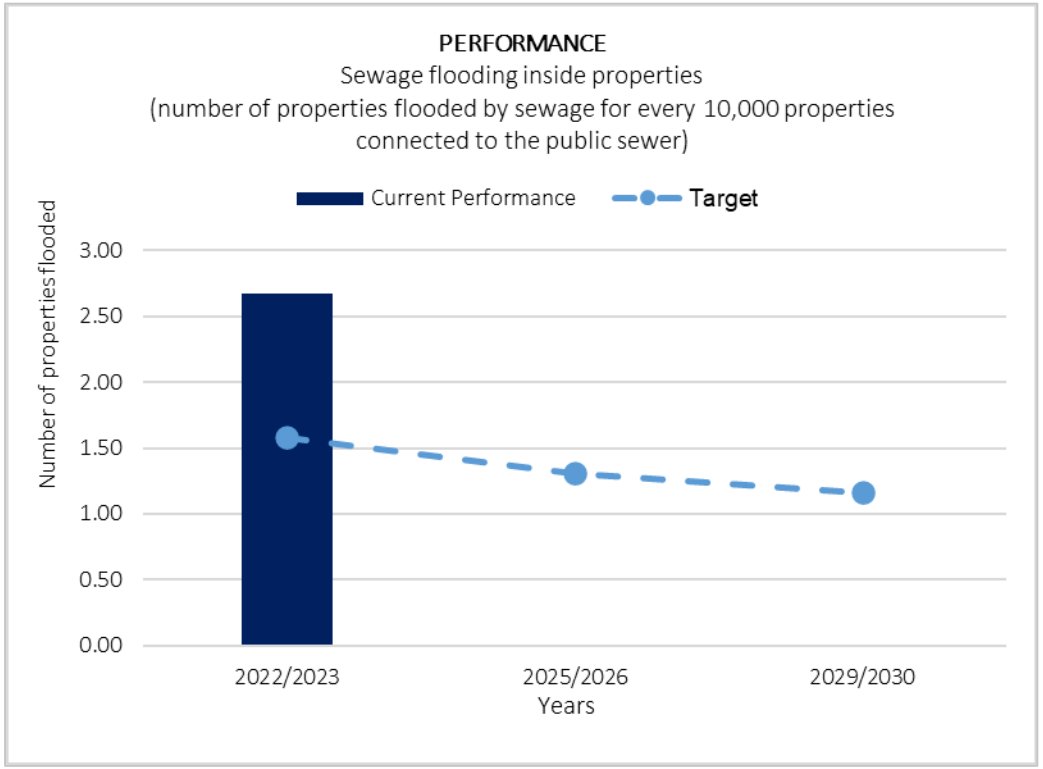
Performance tables and charts:

Participants were informed of their **water supplier's** current performance and future targets for **water supply interruptions, drinking water quality contacts, and leakage.** The **sewerage supplier's** performance included the following services: **sewage flooding inside properties, sewage flooding outside properties** and **pollution incidence.**

These six measures are a sample of the most prominent areas of service performance that directly affect customers, and were selected as being high priorities for consumers.

The below stimuli were accompanied by a detailed description (example on the next slide).

Company	PERFORMANCE Sewage flooding inside properties (number of properties flooded by sewage for every 10,000 properties connected to the public sewer)	
South West Water including Bournemouth	0.63	Better Performance
Dŵr Cymru Welsh Water	1.14	
Northumbrian Water	1.21	
Wessex Water	1.31	
Hafren Dyfrdwy	1.38	
Severn Trent Water	1.65	
Anglian Water including Hartlepool	1.69	
Thames Water	1.91	
Southern Water	2.25	
United Utilities	2.32	
Yorkshire Water	**2.67**	Poorer Performance



Information on how the research materials were constructed can be found in the Appendices.

Participants were also shown a proposal for investments in four areas:

- Sewerage services & environment
- Protecting water supplies
- Improving drinking water quality
- Resilience of services to disruption from external events

The delivery of each investment area (e.g., what form it came in, such as a number of smart meters to be fitted) and spending within these areas were specific for each water company.

NOTE: The **storm overflow investment figure was not included in Hafren Dyfrdwy's Draft Determination** under Sewerage services and environment; the research materials showed this as an area where investment was to be confirmed. This gap may have affected how people answered on acceptability as they had less information to base their response on compared to other companies.

Example:

Resilience of services to disruption from external events - Affinity Water:

We will now show you proposals for investment in other areas of service and we'd like to know which of these are most important to you.

Please take your time to read through the information carefully, before selecting which of the investment proposals is most important to you. There will be a short time delay before you are able to move on, to ensure you can read the information before answering the question. For each area you will see how much the proposed investment spend is between 2025 and 2030.

Improving the resilience of pipes, sewers and treatment works to reduce the risk of disruption to services

The proposal is for Affinity Water to invest £27 million over 2025 to 2030 to improve the resilience of services.

This will include:

£19 million to improve resilience for the company's treatment works and other operational sites.

This includes more back-up power generators to reduce the chance of disruption due to heat or power failure and flood defences to protect key sites like treatment works.

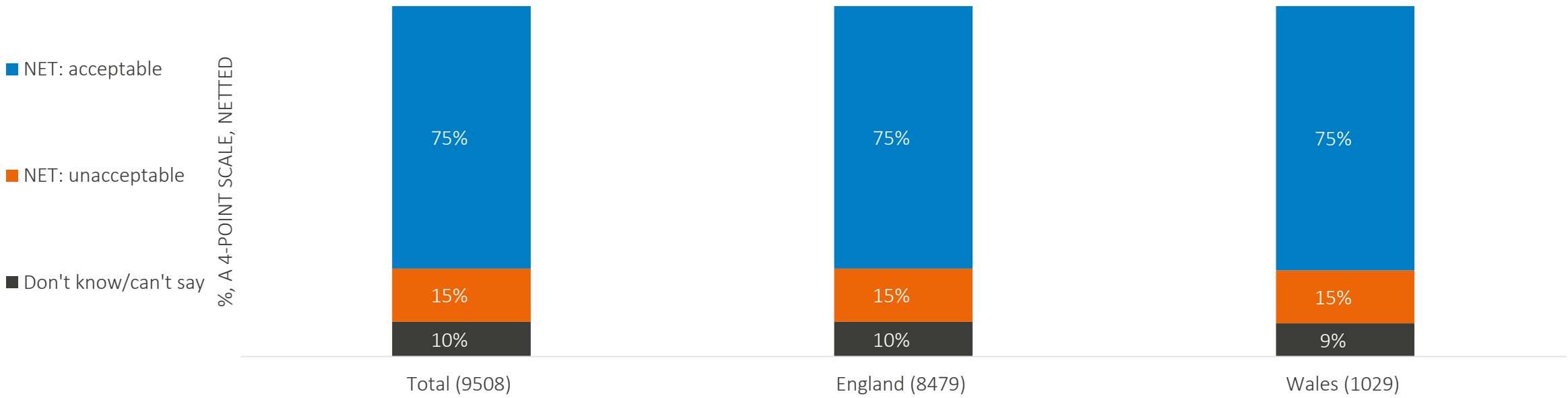
£8 million on other security, including cyber.

This includes cyber security, in order to meet new statutory requirements.

75% of billpayers find the investment proposals acceptable.

Views in **England and in Wales are both similar** to the combined total.

INVESTMENT ACCEPTABILITY BY COUNTRY



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

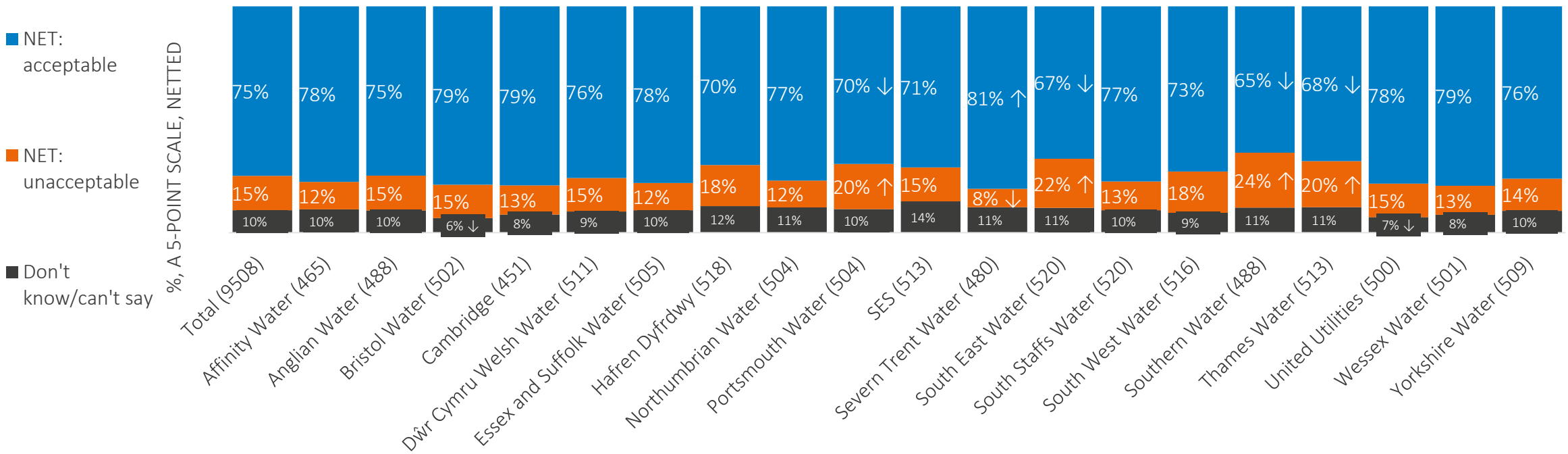
Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL

Acceptability of investment proposals varies by water company.

Compared to England and Wales, investment proposals are less acceptable and more unacceptable in Portsmouth Water, South East Water, Southern Water and Thames Water regions. Acceptability is higher amongst Severn Trent Water customers.

ACCEPTABILITY OF INVESTMENT PROPOSALS

(Don't know excluded, 9% on average)



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL

Acceptability of the investment proposals correlates with billpayers current financial situation and outlook. Those who are more financially comfortable are more likely to accept the investment proposals.

	Those who find the investment proposals acceptable (75%) are more likely to be:	Those who find the investment proposals unacceptable (15%) are more likely to be:
Proposed bill affordability	Those who find the proposed bill easy to afford.	Those who find the proposed bill difficult to afford.
Demographics	More so 25-34 years old or belong to the AB social grades.	More so among 15-34, 55-65 years old, or males.
Vulnerability		More among with medical vulnerability.
Income	From £1,400 to £1,999 a week/ £72,800 to £103,999 a year or above.	
Ethnicity	African ethnicity.	Bangladeshi ethnicity.
Last year bill payments	This group has not experienced financial struggles in the past year.	They have already faced challenges in paying their bills in the past year, at least on some occasions.
Financial condition & outlook	They live comfortably and describe their financial situation as at least "doing all right.“ A notable portion of them anticipate improving financial conditions heading toward 2030.	This group finds their current financial situation difficult or quite difficult, and a notable portion of them anticipate worsening financial conditions heading toward 2030.
Metered water		
Social tariff & IMD Quintiles *	Not identified to be on social tariff.	

Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL (9508)

* Directional as only some push-to-web participants were identified if on social tariff or allocated to IMD quintiles

66% of those who felt proposed bill increases would be difficult to afford nevertheless found the proposed investments acceptable.

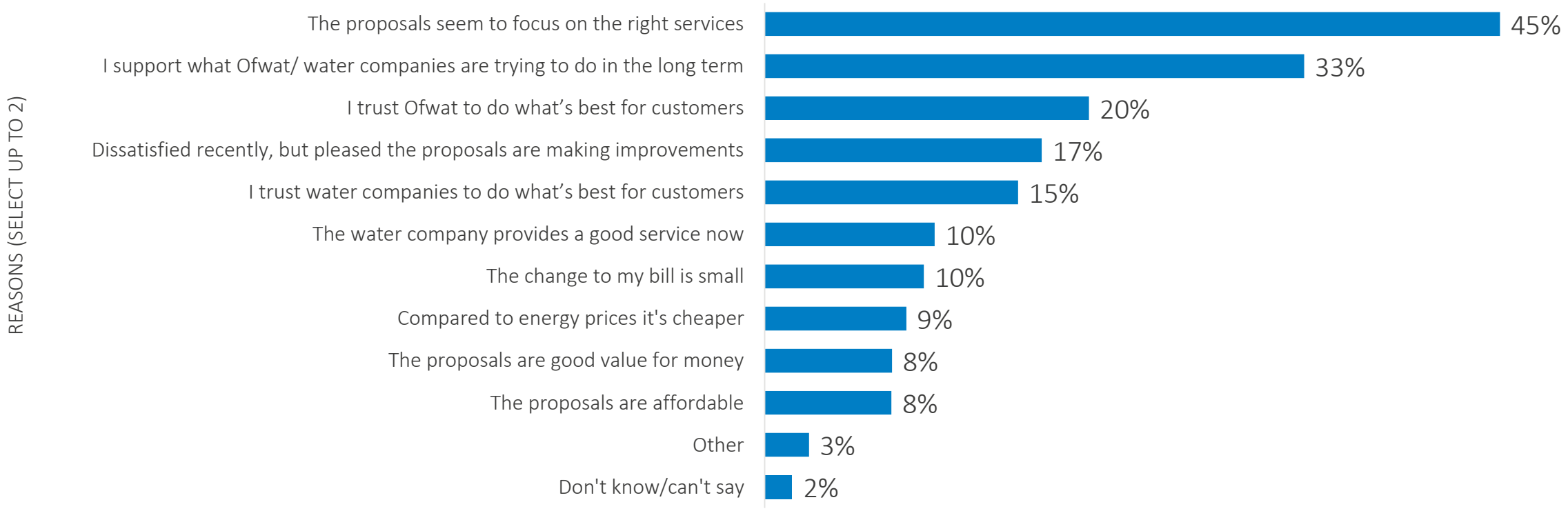
PROPOSED AFFORDABILITY BY INVESTMENT ACCEPTABILITY Row %	NET: ACCEPTABLE	NET: UNACCEPTABLE	DON'T KNOW
NET: EASY (26%) Base: 2629	89%	8%	3%
NEITHER (32%) Base: 2998	76%	13%	11%
NET: DIFFICULT (40%) Base 3707	66%	22%	12%
DON'T KNOW (2%) Base 174	55%	10%	35%

Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base: ALL (9508)
Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL (9508)

The 75% who find the investment proposals acceptable most often cite that the proposals focus on the right services and support the longer term as the reason(s) for this.

Views in **England and in Wales are both similar** to the combined total.

REASON FOR THE INVESTMENT PROPOSALS BEING ACCEPTABLE



Q8b What are the two main reasons that you feel the proposals for your water services are acceptable? BASE: THOSE WHO FOUND THE PROPOSED INVESTMENTS ACCEPTABLE (NETTED) (7138)

*'I have been dissatisfied with the service recently but am pleased that these proposals are making improvements

The overall sentiment reflects a cautious acceptance of proposed water and sewage investments, coupled with strong demands for accountability, fair cost distribution, and urgent action to address historical underinvestment and environmental concerns.

Need for investment and environmental Protection:

Many respondents praise future-proofing and infrastructure development:

"We have to prepare for changing weather patterns and water availability."

There is a strong demand for improved environmental protection and reduction in pollution.

"Sea & river water should be safe to swim in."

Water company and shareholder criticism:

Respondents criticise water companies for their history of underinvestment and excessive focus on shareholder profits, urging that funds should be allocated to necessary improvements instead.

"They should use the money for these things anyway; why should bills be put up for these basic services?"

There is a call for fairer cost distribution, with many believing that shareholders should bear a larger share of the financial burden rather than consumers.

"It is wrong that customers pay more whilst shareholders receive huge dividends."

Concern about costs and bills:

Respondents are worried about the impact of proposed investments on their water bills, expressing that current bills are already too high and that any increase should be minimised.

"I would rather not much increase in bills as we are all just getting by now."

Q8b What are the two main reasons that you feel the proposals for your water services are acceptable? BASE: THOSE WHO FOUND THE PROPOSED INVESTMENTS ACCEPTABLE & SELECTED OTHER (226) THEMATIC ANALYSIS (NOT CODED)

The top two reasons for finding investment proposals acceptable are the same for all companies – focusing on the right services and supporting long-term plans.

Over half of the billpayers in Bristol Water and Wessex Water feel the investment proposals focus on the right services. The highest trust in Ofwat doing what is best for customers is in the Yorkshire region, whilst in Essex and Suffolk Water and SES Water less so. A higher proportion of billpayers of Portsmouth Water, South West Water, Southern Water or Thames Water have been dissatisfied with the service recently but are pleased that the investment proposals are making improvements.

REASON FOR THE INVESTMENT PROPOSAL BEING ACCEPTABLE Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	Northu mbrian Water	Ports mouth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	Southern Water	Thames Water	United Utilities	Wessex Water	York shire Water
Base size	7138	367	372	406	353	390	396	356	396	346	356	391	355	404	384	325	352	397	400	392
The proposals seem to focus on the right services	45%	40%	48%	53% ↑	45%	45%	43%	44%	42%	39%	52%	44%	43%	41%	47%	41%	44%	47%	52% ↑	45%
I support what Ofwat/ water companies are trying to do in the long term	33%	30%	34%	35%	33%	33%	31%	36%	30%	34%	41%	35%	30%	31%	34%	35%	29%	36%	37%	33%
I trust Ofwat to do what's best for customers	20%	18%	20%	19%	20%	17%	14% ↓	20%	19%	20%	14% ↓	20%	24%	21%	20%	23%	18%	19%	18%	24% ↑
I have been dissatisfied with the service recently but am pleased that these proposals are making improvements	17%	16%	12% ↓	15%	11%	14%	17%	15%	14%	23% ↑	10% ↓	17%	18%	10% ↓	27% ↑	30% ↑	22% ↑	14%	12% ↓	15%
I trust water companies to do what's best for customers	15%	17%	17%	16%	16%	15%	17%	14%	17%	15%	14%	15%	13%	20% ↑	11% ↓	10% ↓	16%	14%	13%	19%
The water company provides a good service now	10%	16% ↑	10%	10%	9%	11%	14%	9%	12%	10%	10%	14%↑	8%	16% ↑	6% ↓	5% ↓	7%	11%	13%	7% ↓
The change to my bill is small	10%	12%	11%	9%	11%	9%	13%	12%	11%	8%	8%	8%	12%	12%	6% ↓	10%	10%	10%	11%	8%
Compared to energy prices it's cheaper	9%	9%	10%	4% ↓	12%	6%	11%	9%	12%↑	10%	10%	10%	9%	11%	9%	6%	8%	9%	7%	7%
The proposals are good value for money	8%	11%	7%	11% ↑	6%	8%	8%	9%	11%	9%	11%	7%	9%	7%	6%	5%	8%	6%	7%	8%
The proposals are affordable	8%	7%	8%	9%	11%	7%	10%	7%	7%	11%	10%	7%	9%	11% ↑	9%	5%	9%	7%	10%	7%
Other	3%	4%	4%	4%	1% ↓	4%	2%	4%	3%	3%	5%	3%	3%	2%	6%	3%	4%	3%	2%	2%
Don't know/can't say	2%	1%	2%	1%	4%	3%	1%	1%	1%	1%	0% ↓	2%	2%	2%	1%	1%	2%	2%	2%	1%

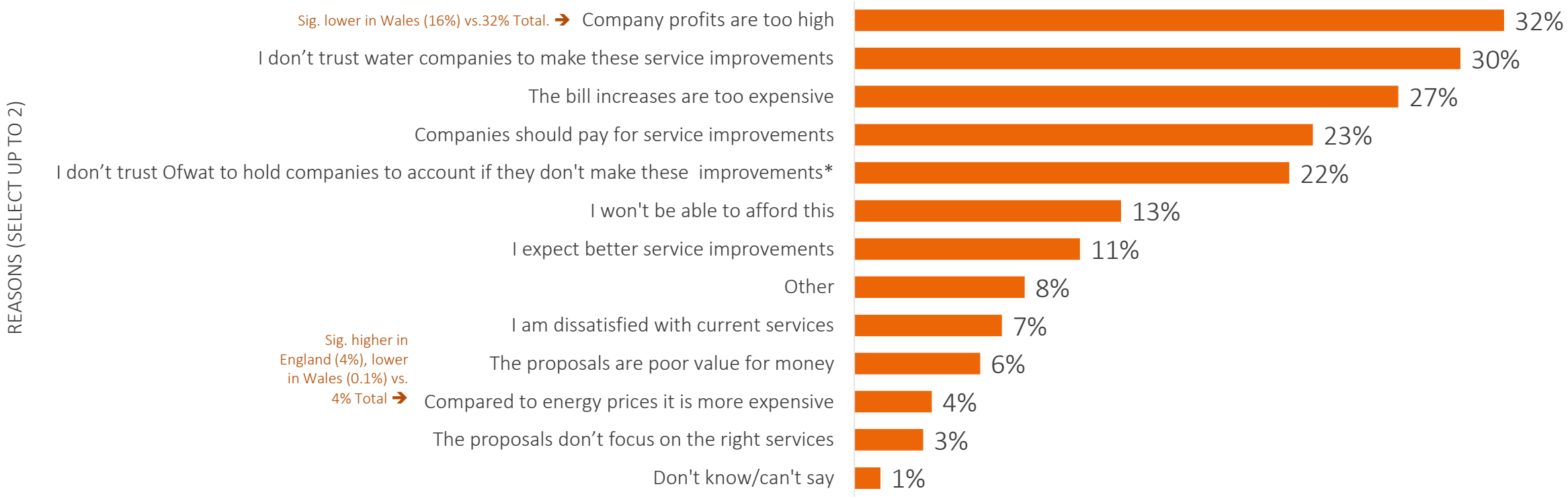
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q8b What are the two main reasons that you feel the proposals for your water services are acceptable? BASE: THOSE WHO FOUND THE PROPOSED INVESTMENT

The 15% that find the investment proposals unacceptable are most likely to say that this is because company profits are too high, they have low trust in companies fulfilling the improvements, or the bill increases are too expensive.

Customers in England are significantly more likely to say that company profits are too high and water is more expensive than energy bills compared to the England and Wales total.

REASON FOR THE INVESTMENT PROPOSALS BEING UNACCEPTABLE



Q8a What are the two main reasons that you feel the proposals for your water services are unacceptable? BASE: THOSE WHO FOUND THE PROPOSED INVESTMENTS UNACCEPTABLE (NETTED) (1445)
*' FULL TEXT: I don't trust Ofwat to hold water companies to account if they do not make these service improvements

Comments made around non-acceptance cover diverse opinions on the investment proposals, highlighting concerns about financial implications, environmental impacts, and trust in the water companies' actions.

Concerns about cost:

Many respondents are worried about the proposed increases in water bills, especially in the context of the ongoing cost of living crisis.

"Our bills are high enough."

Some feel that water companies should use their profits or reduce shareholder dividends instead of passing costs to consumers.

"They should cover these cost out of profits."

Environmental impact:

There is strong support for investments that improve water quality and reduce pollution.

"Focus on improving rivers and beaches."

Criticism of water companies for past environmental damage and slow reactions to issues like sewage dumping.

"Overflow into rivers is unacceptable - companies should put their own profits into stopping this."

Accountability and trust:

Calls for accountability from water companies and regulators like Ofwat to ensure investments lead to tangible improvements.

"I do not trust water companies to do the right thing, so it is important to hold them accountable."

Respondents are confused about why big investments are necessary now since they think water companies should have already been maintaining and improving infrastructure.

"This should have already been done. If the money that has been paid by consumers to the water companies was better invested instead of being given to investors or in bonuses, we wouldn't be in this situation."

Q8a: What are the two main reasons that you feel the proposals for your water services are unacceptable? BASE: THOSE WHO FOUND THE PROPOSED INVESTMENTS ACCEPTABLE & SELECTED OTHER (121) / THEMATIC ANALYSIS (NOT CODED)

The most likely reasons for finding investment proposals unacceptable are company profits being too high and lack of trust in companies to deliver on these.

Billpayers of Northumbrian Water and Thames Water feel more strongly about company profits being too high. Customers of Cambridge Water are more likely to feel that the company should pay for improvements. Nearly a third of Hafren Dyfrdwy billpayers feel they can't afford the proposed bill, which is significantly higher than the views for England and Wales combined.

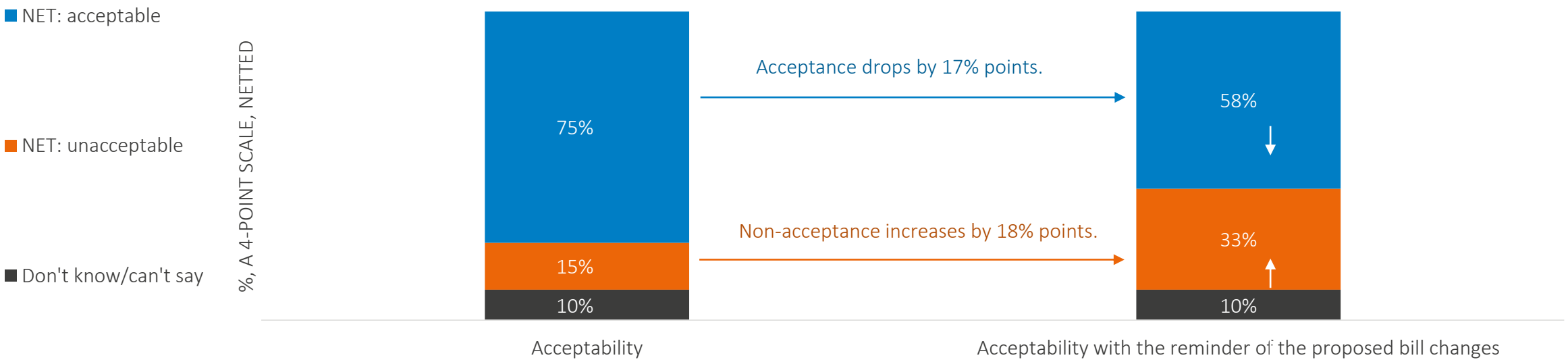
REASON FOR THE INVESTMENT PROPOSAL BEING UNACCEPTABLE Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	North umbrian Water	Ports mouth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	Southern Water	Thames Water	United Utilities	Wessex Water	York shire Water
Base size / ! low base size warning	1445	55	71	62	61	77	58	97	59	100	80	38 !	108	65	87	116	104	71	65	71
Company profits are too high	32%	21%	37%	31%	18% ↓	15% ↓	28%	21%	51% ↑	30%	36%	33%	42%	29%	45%	33%	30%	31%	46% ↑	31%
I don't trust water companies to make these service improvements	30%	36%	31%	34%	37%	30%	24%	29%	24%	36%	45%	32%	40%	21%	38%	40%	27%	26%	32%	22%
The bill increases are too expensive	27%	27%	24%	23%	14%	24%	15% ↓	22%	31%	28%	9% ↓	39%	27%	35%	25%	17% ↓	29%	35%	17%	23%
Companies should pay for service improvements	23%	25%	25%	27%	44% ↑	22%	22%	28%	16%	27%	39%	26%	18%	21%	20%	26%	19%	23%	26%	27%
I don't trust Ofwat to hold water companies to account if they do not make these service improvements	22%	23%	19%	28%	11%	19%	15%	32%	12%	17%	18%	31%	23%	19%	24%	18%	24%	25%	22%	14%
I won't be able to afford this	13%	7%	11%	12%	1% ↓	13%	15%	30% ↑	13%	15%	5% ↓	8%	6%	11%	10%	16%	15%	21%	10%	13%
I expect better service improvements	11%	18%	17%	18%	11%	14%	16%	10%	16%	15%	15%	9%	8%	16%	7%	9%	7%	12%	6%	12%
I am dissatisfied with current services	7%	1% ↓	6%	5%	1% ↓	14%	12%	4%	8%	4%	2% ↓	0%	8%	12%	10%	13% ↑	7%	6%	12%	10%
The proposals are poor value for money	6%	3%	2%	2%	11%	10%	5%	1% ↓	6%	5%	11%	5%	9%	11%	2% ↓	7%	8%	6%	5%	9%
Compared to energy prices it is more expensive	4%	4%	7%	1%	0%	0%	9%	1%	2%	0%	8%	6%	3%	2%	1%	2%	6%	2%	0%	6%
The proposals don't focus on the right services	3%	3%	5%	2%	2%	5%	5%	6%	1%	3%	1%	2%	3%	7%	1%	4%	4%	2%	3%	6%
Other	8%	17%	8%	9%	25% ↑	12%	4%	8%	7%	7%	7%	9%	9%	7%	9%	9%	6%	3%	7%	16%
Don't know/can't say	1%	0%	1%	2%	1%	4%	8% ↑	1%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	2%	1%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q8a What are the two main reasons that you feel the proposals for your water services are unacceptable? BASE: THOSE WHO FOUND THE PROPOSED INVESTMENTS UNACCEPTABLE (NETTED) (1445)

Billpayers were asked about investment proposals' acceptability again, but this time alongside a reminder of the proposed bills for 2025-30. The level of non-acceptance doubles, but 58% still find the proposal acceptable.

INVESTMENT ACCEPTABILITY WITHOUT AND WITH BILL PROPOSAL

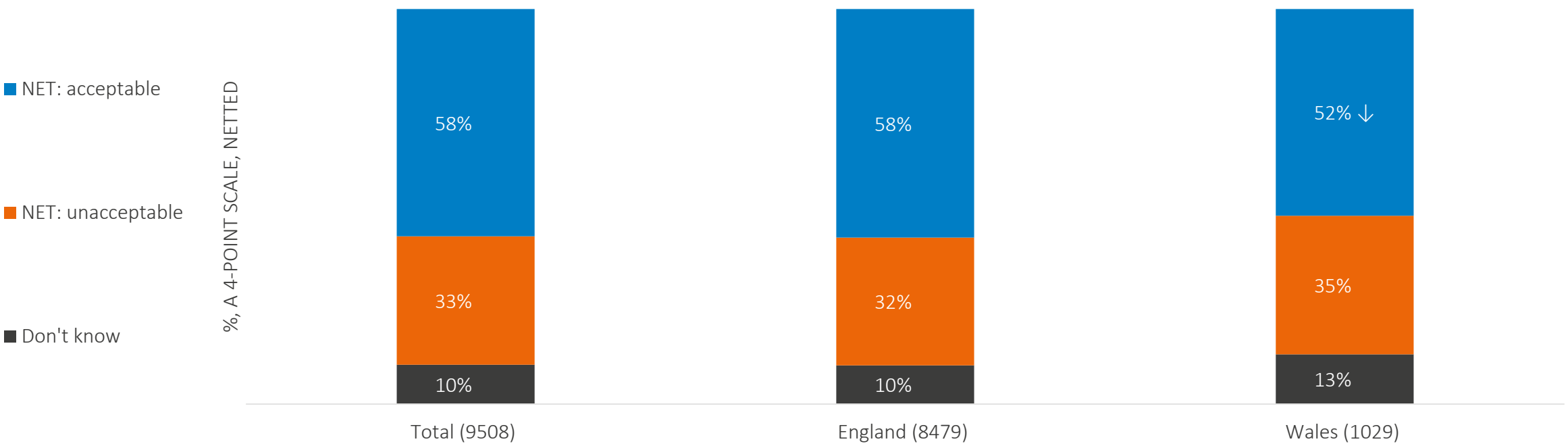


Arrows next to the numbers mark significant differences between Acceptability and Acceptability with the reminder of the proposed changes,
↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL (9508)
Q10a Now, thinking about the proposed bill levels for 2025 to 2030, the investment that is planned in services and the proposed service levels, how acceptable or unacceptable are the proposals to you? You can see the reminder of changes to your bill prof Base: ALL (9508)

Billpayers in Wales are less likely to accept the proposal when linked to proposed bill changes.

INVESTMENT ACCEPTABILITY WITH THE REMINDER OF THE PROPOSED CHANGES BY COUNTRY



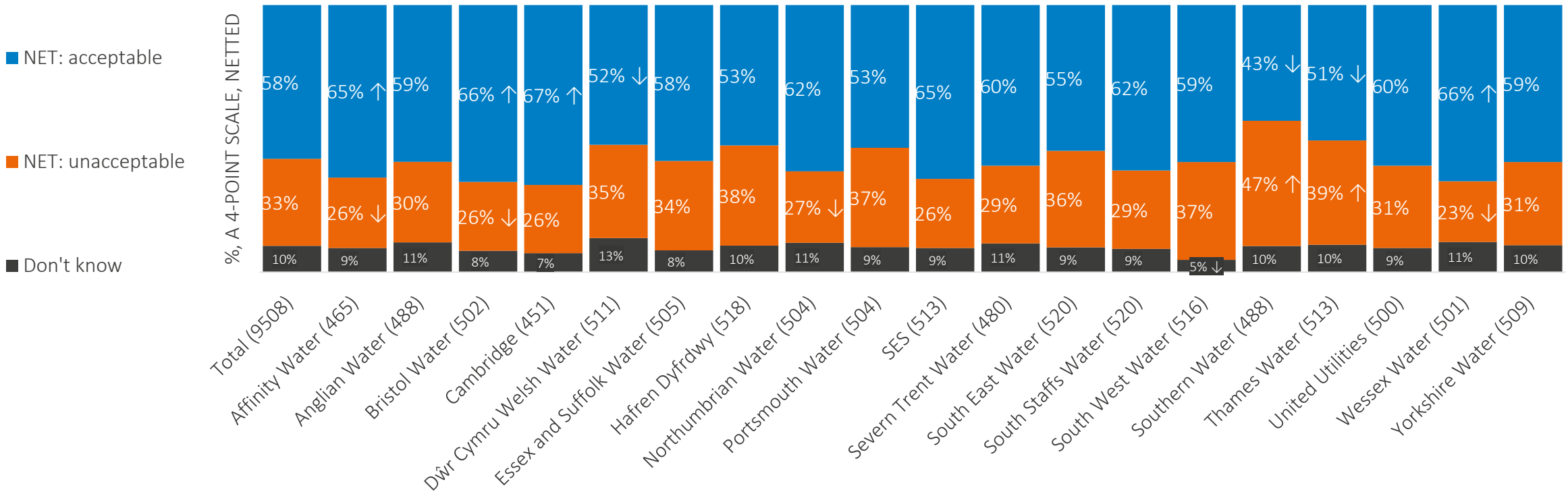
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q10a Now, thinking about the proposed bill levels for 2025 to 2030, the investment that is planned in services and the proposed service levels, how acceptable or unacceptable are the proposals to you? Base: ALL

When reminded of the proposed bill changes, acceptability of investments varies in some water company areas.

There is a higher acceptability for Affinity, Bristol, Cambridge and Wessex Water.
Lower acceptability for Dŵr Cymru Welsh Water, Southern, and Thames Water regions.

INVESTMENT ACCEPTABILITY WITH THE REMINDER OF THE PROPOSED CHANGES



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

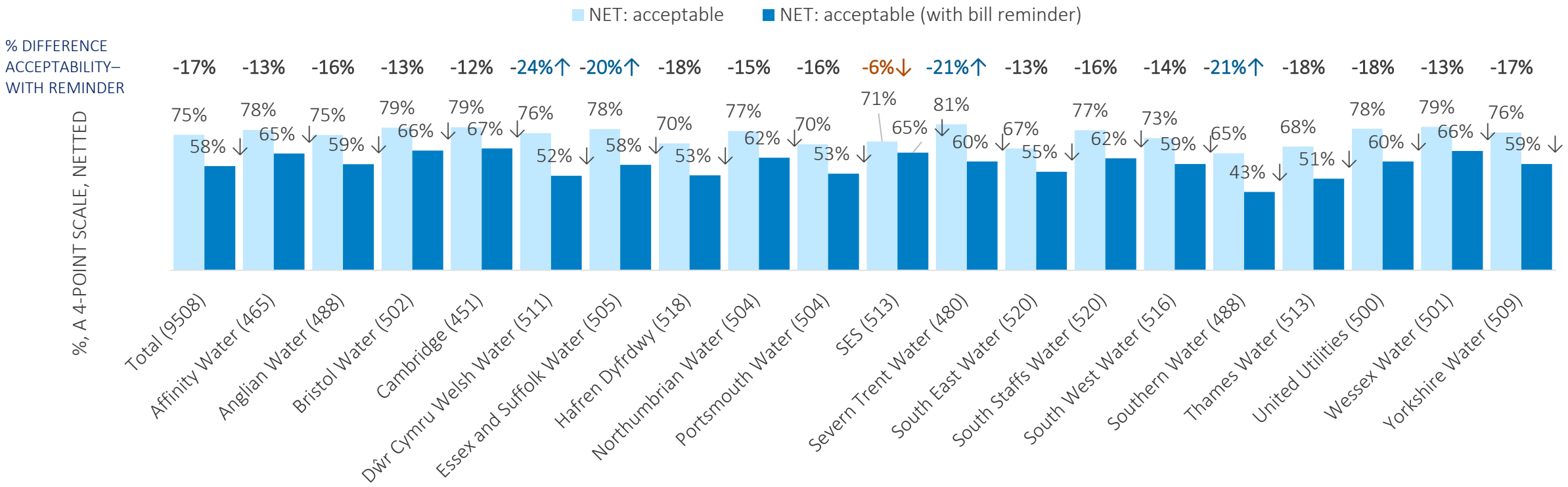
Q10a Now, thinking about the proposed bill levels for 2025 to 2030, the investment that is planned in services and the proposed service levels, how acceptable or unacceptable are the proposals to you? Base: ALL

When linked to the proposed bill changes, there is a significant drop in acceptance across all companies.

The most significant differences are observed for Dŵr Cymru, Essex and Suffolk, Severn Trent, Southern and Thames Water, lowest for SES Water.

INVESTMENT ACCEPTABILITY WITH THE REMINDER OF THE PROPOSED CHANGES

DIFFERENCE: PROPOSED NET EASY ACCEPTABILITY – CURRENT NET EASY ACCEPTABILITY. Colour is coding used to mark the greatest (orange) and smallest (blue) differences in affordability).



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q10a Now, thinking about the proposed bill levels for 2025 to 2030, the investment that is planned in services and the proposed service levels, how acceptable or unacceptable are the proposals to you? Base: ALL, Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL

Based on spontaneous feedback from all billpayers, the majority accept the investments and the proposed bill. However, the overall sentiment is mixed and leans towards cautious acceptance.

While there is strong support for necessary investments to improve infrastructure and environmental protection, respondents express significant frustration with water companies' past practices and are concerned about the financial impact on consumers, advocating for fairer cost distribution and accountability.

"I think that the increase in price will be acceptable if it's clear that investment is working. If there are no signs of any improvement, then the increase in price will be inappropriate."

Q10b What are the reasons for this? Base: ALL (8330) / THEMATIC ANALYSIS (NOT CODED)

Key themes for acceptance include…

Support for necessary investments:

A number of respondents acknowledge the necessity of the proposed investments to **ensure better water services, environmental protection**, and **adaptation to future needs**, such as **climate change**.

They see the investments as crucial for improving water quality, preventing leaks, and reducing pollution in rivers and coastal areas.

Value for money:

Some respondents feel that the proposed **increases in bills are reasonable** and offer good value, **considering the scope** of the **improvements** promised.

A few mention that spreading the increase over several years makes it more manageable, and they would be prepared to pay more for a safer, more reliable water service in the long run.

Recognition of environmental benefits:

Several respondents express **approval of the environmental goals**, such as reducing water wastage, improving sewage systems, and cleaning up rivers.

They believe that the investments are necessary to **ensure the health of ecosystems and future generations**.

Improved accountability:

Some respondents feel reassured that Ofwat's involvement and **the push for meeting legal standards** will lead to more accountability from water companies.

They hope that increased **regulatory pressure will force companies to deliver on their promises**.

Willingness to contribute:

There is a sense among some respondents that they are **prepared to pay a little more** if it means **securing better water services and helping the environment**.

They view these investments as a **collective responsibility to ensure long-term sustainability**.

Q10b What are the reasons for this? Base: ALL (8330)) / THEMATIC ANALYSIS (NOT CODED)

Key themes for non-acceptance include…

Distrust in water companies' use of profits:

Many respondents believe that water companies have prioritised paying dividends and bonuses to shareholders and executives, rather than investing in infrastructure.

They feel that the **companies should use their profits to cover the necessary investments instead of asking consumers** to pay more.

Affordability and cost of living:

A significant number of respondents express concerns about affordability, particularly in the context of the **rising cost of living**.

They feel that they cannot afford further increases in their water bills, especially given **stagnant wages and economic uncertainty**.

Perception of mismanagement:

Respondents frequently mention the **long-term mismanagement of water companies**, particularly their failure to invest in necessary infrastructure.

This perception leads to the belief that customers should not be penalized for the companies' poor management practices.

Nationalisation advocacy:

Some respondents argue that **water should be nationalised**, claiming that essential resources like water should not be profit-driven.

They believe that public ownership would eliminate the need for shareholder profits and allow all funds to be directed toward infrastructure and service improvements.

Skepticism about service improvements:

There is widespread **doubt** among respondents **that the proposed investments will lead to genuine service improvements**.

They feel that past promises have not been fulfilled, and they are sceptical that the additional funds will be used effectively to improve water quality or reduce environmental impact.

Q10b What are the reasons for this? Base: ALL (8330) / THEMATIC ANALYSIS (NOT CODED)

5

INVESTMENT PRIORITIES

Key investment areas

To understand the acceptability of the investment proposals, we presented billpayers with investment areas within the following four categories. The investments included relevant numbers and targets from the Draft Determinations. The aim was to determine which investment within each category was most important to billpayers. Some of these investment areas were shown to respondents of all water companies, and some, such as the Thames Tideway Tunnel, to a sub-set of water companies.

Improving sewerage services and the environment

- Improving sewage treatment processes to help river water quality
- Reducing the use of storm overflows which release sewage into rivers
- Increasing the capacity of sewage treatment works
- Monitoring river water quality
- Thames Tideway Tunnel
- Additional septic tank treatment facilities

Protecting water supplies

- Starting to develop large-scale water supply schemes
- Fitting smart water meters
- Building water supply connections in the company area
- Reducing leakage
- Improving water supply
- Better management of water use
- Developing new sources of water
- Reducing demand for water

Improving drinking water quality

- Additional water treatment processes
- Replacement of lead supply pipes

Improving the resilience of pipes, sewers and treatment works to reduce the risk of disruption to services

- Improving the resilience of treatment works, pipes and technology
- Improving security and resilience to cyber attacks

Importance differs by water company; this is mainly driven by which options were shown to billpayers.

NB. The customers of water only companies, shown in blue on the table below, receive their sewerage services from a separate sewerage service provider. The findings are presented as a whole below to reflect the views of water only companies customers on sewerage services. Sewerage service providers are shown in black text.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

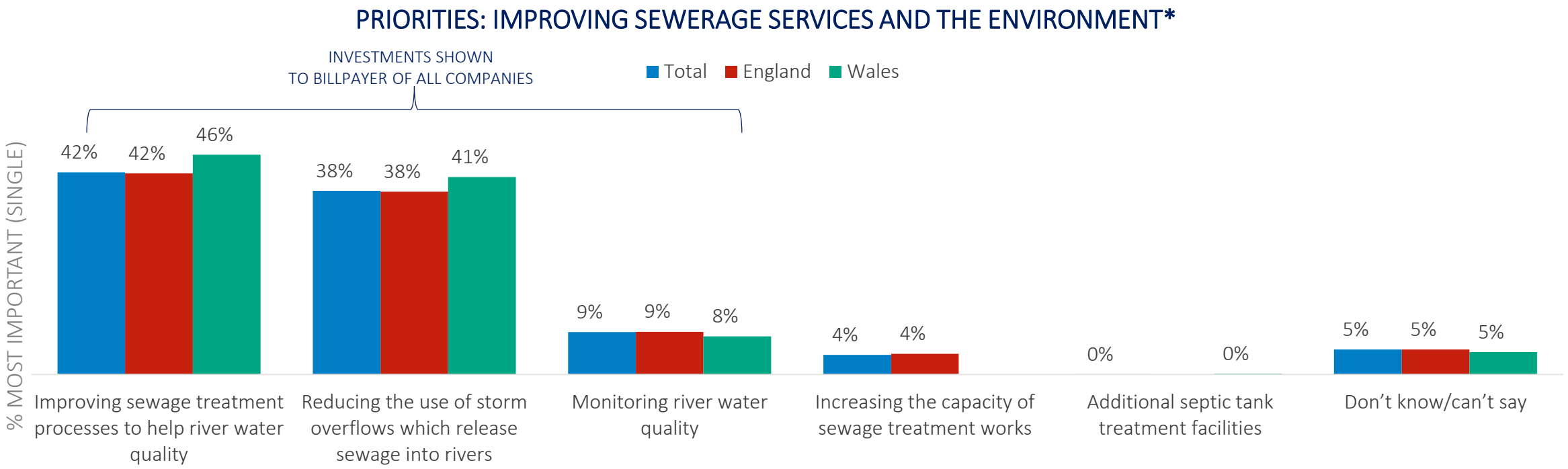
IMPROVING SEWERAGE SERVICES AND THE ENVIRONMENT Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	North umbrian Water	Portsmo uth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	South ern Water	Thames Water	United Utilities	Wessex Water	York shire Water
Base	9508	465	488	502	451	511	505	518	504	504	513	480	520	520	516	488	513	500	501	509
Improving sewage treatment processes to help river water quality	42%	47%	35% ↓	47%	38%	46%	46%	49%	45%	35% ↓	49%	43%	37% ↓	48% ↑	36% ↓	36% ↓	42%	42%	42%	47% ↑
Reducing the use of storm overflows which release sewage into rivers	38%	32% ↓	29% ↓	40%	28% ↓	41%	29% ↓	40%	42%	57% ↑	36%	43% ↑	52% ↑	37%	53% ↑	52% ↑	34% ↓	33% ↓	44% ↑	38%
Monitoring river water quality	9%	9%	8%	7%	7%	8%	7%	3% ↓	9%	5% ↓	6%	9%	8%	10%	7%	8%	12% ↑	8%	10%	9%
Increasing the capacity of sewage treatment works	4%	2% ↓	22% ↑		24% ↑		12% ↑											13% ↑		
Thames Tideway Tunnel	1%	4% ↑					2%				4% ↑						5% ↑			
Additional septic tank treatment facilities	0.01%							2% ↑												
Don't know/can't say	5%	6%	6%	6%	4%	5%	4%	6%	4%	3%	5%	4%	3%	5%	4%	4%	7%	5%	4%	6%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7a Based on what you have just read, which of these is the most important to you relating to improving sewerage services and the environment? by Company (single) Base: ALL (9508)

‘Improving sewage treatment processes to help river water quality’ and ‘Reducing the use of storm overflows which release sewage into rivers’ are most important to billpayers out of the investments they saw.

Views in **England and in Wales are both similar** to the combined total.



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7a Based on what you have just read, which of these is the most important to you relating to improving sewerage services and the environment? by Company (single) Base: ALL (9508)

Importance differs by water company, mainly driven by which options were shown to billpayers.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

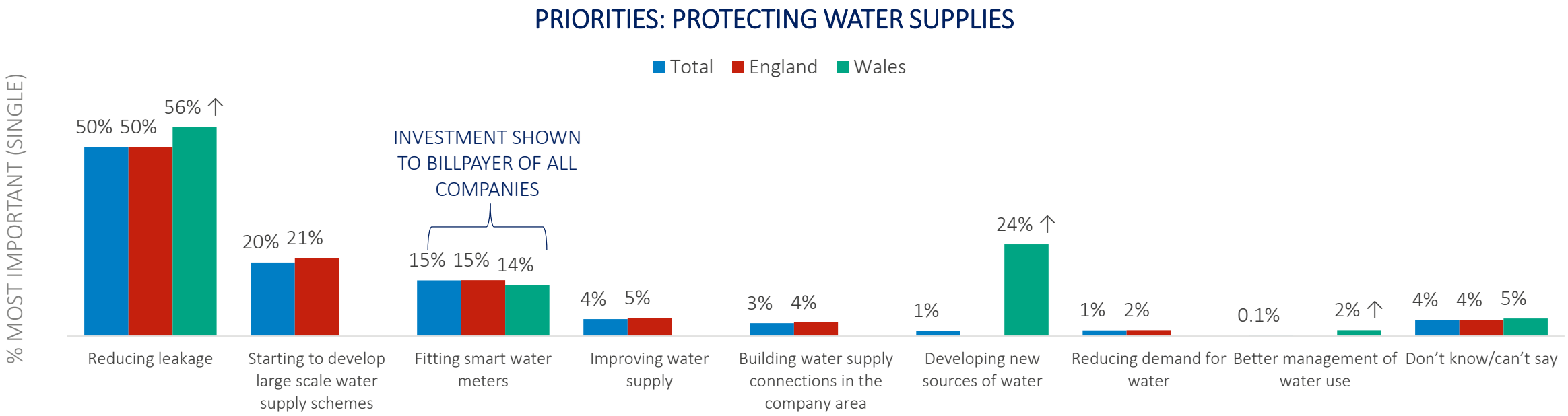
PROTECTING WATER SUPPLIES Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	North umbrian Water	Ports mouth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	Southern Water	Thames Water	United Utilities	Wessex Water	Yorkshire Water
Column n	9508	465	488	502	451	511	505	518	504	504	513	480	520	520	516	488	513	500	501	509
Reducing leakage	50%	48%		78% ↑	55%	56%	44% ↓	58% ↑	52%	67% ↑	83% ↑	43% ↓	55%	56% ↑	40% ↓	48%	50%	78% ↑		75% ↑
Starting to develop large scale water supply schemes	20%	29% ↑	39% ↑				41% ↑		26% ↑			18%	28% ↑		27% ↑	37% ↑	31% ↑		47% ↑	
Fitting smart water meters	15%	10% ↓	13%	19% ↑	15%	13%	14%	15%	17%	20% ↑	13%	11% ↓	14%	15%	8% ↓	11%	15%	19% ↑	17%	22% ↑
Improving water supply	4%		35% ↑		26% ↑									27% ↑	21% ↑					
Building water supply connections in the company area	3%	8% ↑										21% ↑								
Developing new sources of water	1%					26% ↑														
Reducing demand for water	1%		8% ↑							9% ↑									32% ↑	
Better management of water use	0%							22% ↑												
Don't know/can't say	4%	4%	6%	3%	3%	5%	1% ↓	4%	5%	4%	4%	6%	3%	2% ↓	3%	3%	5%	3%	5%	3%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7b Based on what you have just read, which of these is the most important to you relating to protecting water supplies? BASE: ALL (8330)
* Better management of water use' is an option that was only seen in Wales. It's similar to 'Reducing demand for water'. We kept it separate.

For both England and for Wales, reducing leakage is the most important investment for water companies to focus on.

There is significantly more appetite for reducing leakage in Wales than the combined total for England and Wales.



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7b Based on what you have just read, which of these is the most important to you relating to protecting water supplies? BASE: ALL (8330)
* Better management of water use' is an option that was only seen in Wales. It's similar to 'Reducing demand for water'. We kept it separate.

Some differences were noted between water companies.

Replacement of lead supply pipes is a bigger priority for respondents in Northumbrian Water.
South East Water billpayers place equal importance on the two investment areas.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

IMPROVING DRINKING WATER QUALITY Column %	Total	Affinity Water	Anglian Water*	Bristol Water*	Cambridge Water	Dŵr Cymru Welsh Water*	Essex and Suffolk Water	Hafren Dyfrdwy**	Northumbrian Water	Portsmouth Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water*	Southern Water	Thames Water	United Utilities*	Wessex Water	Yorkshire Water
Base	8990	465	488	502	451	511	505		504	504	513	480	520	520	516	488	513	500	501	509
Replacement of lead supply pipes	56%	50%	54%	51%	53%	55%	59%		63% ↑	50% ↓	56%	57%	47% ↓	54%	57%	55%	57%	59%	53%	56%
Additional water treatment processes	38%	44% ↑	38%	44% ↑	40%	40%	37%		32%↓	44% ↑	38%	37%	46% ↑	39%	38%	41%	36%	35%	40%	37%
Don't know/can't say	6%	6%	8%	6%	7%	6%	4%		5%	6%	5%	7%	7%	7%	5%	5%	7%	6%	6%	6%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

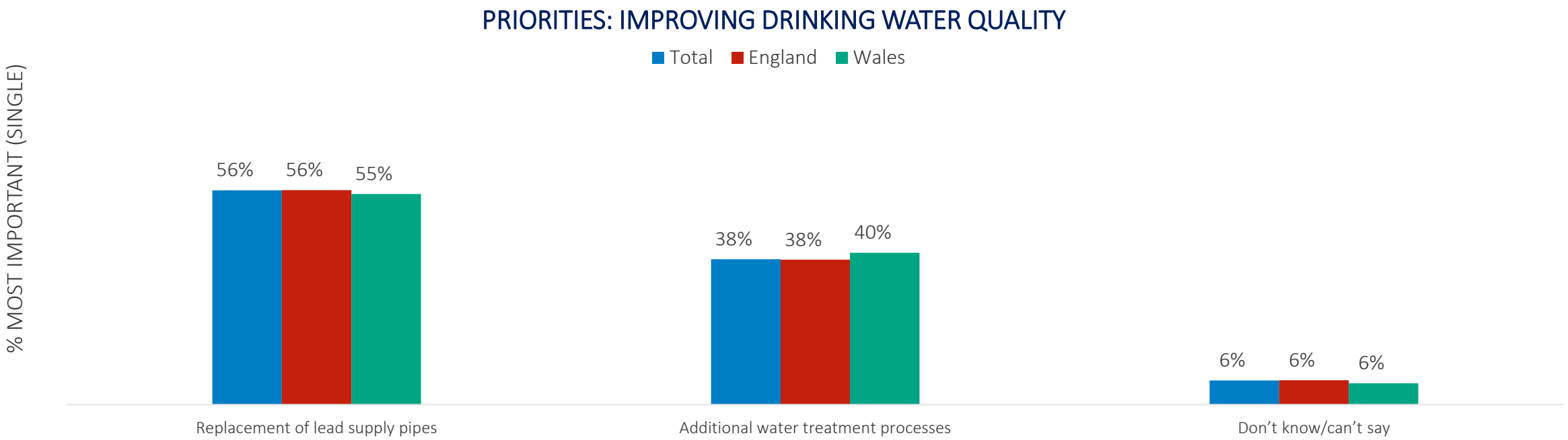
*Improvements for taste, odour and colour of drinking water were included in the investment total, but not shown for Anglian Water, Bristol Water, South West Water, United Utilities, Dŵr Cymru Welsh Water and Yorkshire Water. It is possible that had they been included they would have affected the order of priority for these companies.

Q7c Based on what you have just read, which of these is the most important to you relating to improving drinking water quality? Base: ALL EXCEPT HAFREN DYFRDWY, TOTAL (8990)

**Hafren Dyfrdwy were only shown 'the Replacement of lead supply pipes' investment, therefore, the importance question was irrelevant.

For investments which Improve drinking water quality, ‘Replacement of lead supply pipes’ is more important than ‘Additional water treatment processes’.

Views in **England and in Wales are both similar** to the combined total.



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7c Based on what you have just read, which of these is the most important to you relating to improving drinking water quality? Base: ALL EXCEPT HAFREN DYFRDWY, TOTAL (8990)

*Hafren Dyfrdwy were only shown ‘the Replacement of lead supply pipes’ investment, therefore, the importance question was irrelevant.

Importance is consistent across water companies.

Improving the resilience of treatment works and operational sites is a bigger priority for respondents in South West Water.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

RESILIENCE OF SERVICES TO DISRUPTION FROM EXTERNAL EVENTS Column %	Total	Affinity Water	Anglian Water	Bristol Water	Cam bridge Water	Dŵr Cymru Welsh Water	Essex and Suffolk Water	Hafren Dyfrdwy	North umbrian Water	Portsmou th Water	SES Water	Severn Trent Water	South East Water	South Staffs Water	South West Water	Southern Water	Thames Water	United Utilities	Wessex Water	York shire Water
Base	9508	465	488	502	451	511	505	518	504	504	513	480	520	520	516	488	513	500	501	509
Improving the resilience of treatment works and operational sites	84%	87%	82%	84%	84%	83%	86%	86%	84%	84%	82%	83%	83%	82%	90% ↑	86%	82%	86%	81%	85%
Improving security and resilience to cyber attacks	10%	8%	11%	9%	12%	12%	11%	6%	11%	11%	12%	11%	12%	13%	6% ↓	10%	11%	10%	12%	9%
Don't know/ can't say	6%	6%	7%	7%	4%	5%	3% ↓	8%	5%	5%	6%	6%	6%	5%	4%	4%	6%	4%	7%	6%

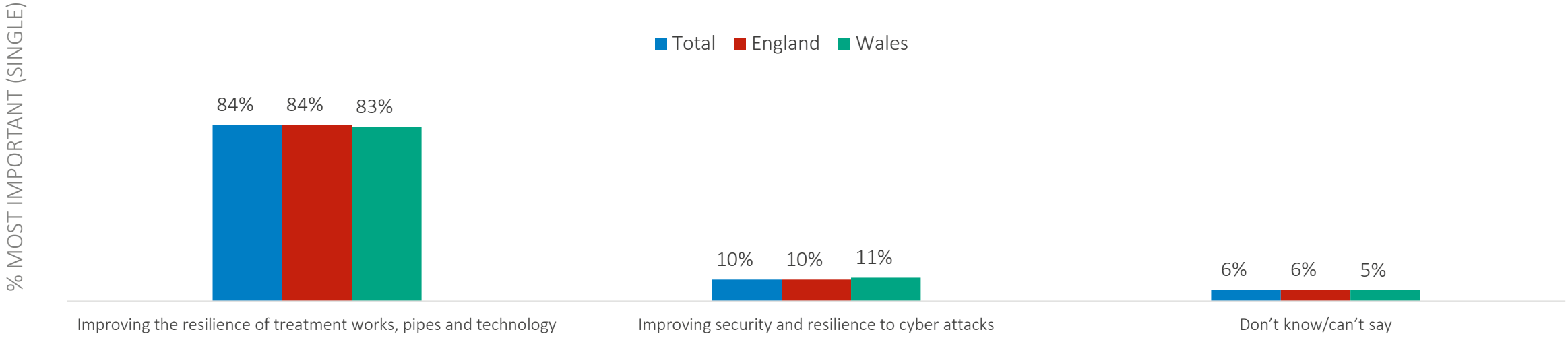
Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7d: Based on what you have just read, which of these is the most important to you relating to improving the resilience of pipes, sewers and treatment works to reduce the risk of disruption to services? Base: TOTAL (8330)

On making services more resilient to disruption from external events, billpayers place more importance on improving the resilience of treatment works, pipes and technology vs. improving security and cyber attack resilience.

Views in **England and in Wales are both similar** to the combined total.

PRIORITIES: IMPROVING THE RESILIENCE OF SERVICES TO DISRUPTION FROM EXTERNAL EVENTS



Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7d: Based on what you have just read, which of these is the most important to you relating to improving the resilience of pipes, sewers and treatment works to reduce the risk of disruption to services? Base: TOTAL (8330)

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Impact Research, located in Walton-On-Thames, Surrey, was founded in 2010 by Darryl Swift and Dr. David Pearmain, focusing on research in utilities sector from the start. In 2017, we achieved ISO 20252 accreditation, which we've renewed annually since.

Over the years, we've been supporting clients by combining quantitative and qualitative methods to deliver actionable insights. Our dedicated team has built a strong reputation for excellence and innovation.

We've successfully executed projects across various sectors, including FMCG and retail, gas, electricity, water, and local authorities.

In this report, we explored water bill acceptability and affordability for the next 5 years, drawing on our expertise to provide valuable insights and recommendations for CCW and Ofwat.

IMPACT

FROM INSIGHT TO INFLUENCE

6

APPENDICES

FROM INSIGHT TO INFLUENCE

STIMULI: CONSTRUCTING THE RESEARCH MATERIALS

FROM INSIGHT TO INFLUENCE

Constructing the research materials

Proposed bills from 2025-30

- For most companies, this was based on data provided by Ofwat and adjusted to include forecast inflation; push to web respondents saw a personalised bill profile, online panel respondents saw a bill profile based on the average household water charges
- For Northumbrian Water and Essex and Suffolk Water, South Staffs Water and Cambridge Water, South West Bournemouth and Bristol Water, the respective companies provided the data for CCW/Impact to build specific bill profiles for each area – this meant that respondents saw something more representative of the potential bills changes in their area
- Respondents from water only companies saw a proposed bill which included proposed sewerage service charges – this was made clear in the supporting text

Water company performance data

- Performance data was based on Ofwat's Water Company Performance report 2022-23, and future performance targets as published in the Draft Determinations

Investment proposal stimulus

- This was based on Ofwat's Overview document for each water company's Draft Determination
- Where possible the wording for these was generic to support comparisons between companies; context for Wales was included
- Where helpful for respondents, company specific examples were provided under the generic wording, e.g., for large scale water supply developments

Investment costs

- Respondents saw the proposed investment for each investment area – the total amount over the five years from 2025-30

The stimulus materials for each water company are published at the end of each water company report. These are available on CCW's website here

Proposed water bill profile: exact wording:

Alternation based on the type of billpayer in blue

The chart below shows these changes / for the average household water bill for your water company. It also shows how inflation may affect your bill, based on the inflation forecast from the Office for Budget Responsibility.

Water bills change each year in line with inflation.
Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases at a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases at a faster rate than inflation, then you are likely to have more money to go around.

For example, if an average shop in 2023 cost £100 and inflation was at 5%, then the average cost in 2024 would be £105.
The Bank of England aims to keep inflation at 2%, but it has been quite a bit higher than this at times in the last year or so, although it recently fell in line with the target.

As well as changing in line with inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Office for Budget Responsibility forecasts for inflation from 2025 to 2030 and proposed amounts to cover the investment in water and sewerage services needed by your water company over the next few years.

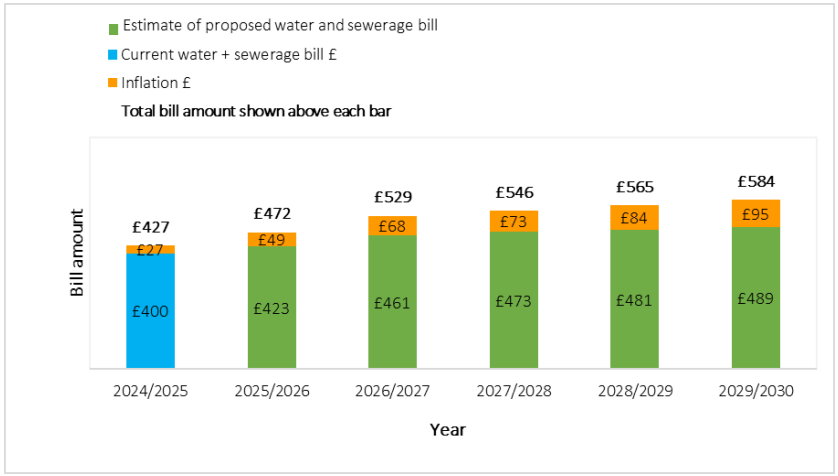
IF METERED WATER Your bill for 2024/2025 has been estimated based on your current charges.

IF SERVICED BY 2 COMPANIES: Please note this shows the proposed total bill from water company for your water supply and sewerage company for your sewerage service.

IF SOCIAL TARIFF: This water bill is based on the financial support scheme you are currently on.

CHANGES FOR THE AVERAGE HOUSEHOLD WATER AND SEWERAGE BILL IN YOUR REGION / TO YOUR WATER BILL

Please note that some numbers may not appear to add up exactly. This is due to rounding.



Example: Sewage flooding inside properties performance - Yorkshire Water

Alternation based on the company in blue

YOUR WATER COMPANY PERFORMANCE ON THE FOLLOWING MEASURE:

SEWAGE FLOODING INSIDE PROPERTIES

The number of properties flooded by sewage for every 10,000 properties connected to the public sewer. An escape of sewage inside a property is highly inconvenient, disruptive and a potential health risk. In bad cases, people might need to move out of their property while things are put right.

Performance for each company is shown as the number of properties flooded by sewage for every 10,000 properties connected to the public sewer for 2022/2023.

The lower numbers, which are displayed at the top of the table, are better, as that means fewer properties have been affected by sewage inside.

In 2022/2023 **Yorkshire Water did not meet** its performance target.

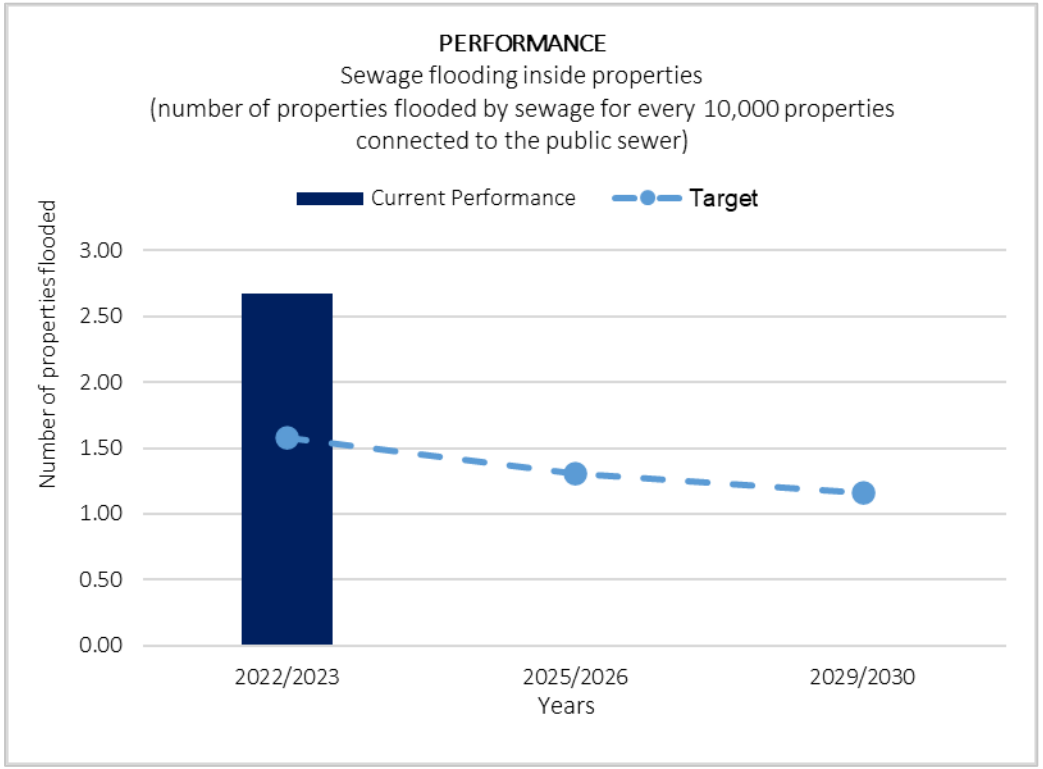
Yorkshire Water perform at **11** out of 11 companies on this measure.

This table shows how the water companies compare for **sewage flooding inside properties** for 2022/2023.

Company	PERFORMANCE Sewage flooding inside properties (number of properties flooded by sewage for every 10,000 properties connected to the public sewer)	
South West Water including Bournemouth	0.63	Better Performance
Dŵr Cymru Welsh Water	1.14	
Northumbrian Water	1.21	
Wessex Water	1.31	
Hafren Dyfrdwy	1.38	
Severn Trent Water	1.65	
Anglian Water including Hartlepool	1.69	
Thames Water	1.91	
Southern Water	2.25	
United Utilities	2.32	
Yorkshire Water	**2.67**	Poorer Performance

PROPOSALS FOR YOUR COMPANY'S PERFORMANCE FROM 2025 TO 2030

The information below shows proposals for the future performance of **Yorkshire Water**, a company that provides sewerage services to your household for sewage inside properties. By 2030 they will aim to reduce it to **1.16** floods for every 10,000 properties connected to the public sewer. The service improves as the number gets smaller.



SAMPLE PROFILE

IMPACT

FROM INSIGHT TO INFLUENCE

England & Wales 2021 census regional gender profile was applied to company quotas.

GENDER BY WATER COMPANY Row%	TARGET			ACHIEVED UNWEIGHTED %			ACHIEVED WEIGHTED %		
	Female	Male	Other	Female	Male	Other	Female	Male	Other
Affinity Water	48%	52%	open	49%	51%	0.2%	48%	52%	0%
Anglian Water including Hartlepool	48%	52%	open	55%	45%	0.0%	45%	55%	0%
Bristol Water	48%	52%	open	56%	44%	0.4%	48%	52%	1%
Cambridge Water	48%	52%	open	53%	46%	0.2%	48%	52%	0%
Dŵr Cymru Welsh Water	48%	52%	open	54%	46%	0.4%	48%	52%	0%
Essex and Suffolk Water	48%	52%	open	54%	46%	0.2%	48%	52%	0%
Hafren Dyfrdwy	48%	52%	open	52%	48%	0.2%	48%	52%	0%
Northumbrian Water	48%	52%	open	55%	45%	0.0%	48%	52%	0%
Portsmouth Water	48%	52%	open	54%	46%	0.2%	48%	52%	0%
SES Water	49%	51%	open	54%	46%	0.0%	50%	50%	0%
Severn Trent Water	48%	52%	open	51%	49%	0.2%	48%	52%	0%
South East Water	48%	52%	open	55%	44%	0.2%	48%	52%	0%
South Staffs Water	49%	51%	open	53%	46%	0.8%	48%	51%	1%
South West Water including Bournemouth	48%	52%	open	53%	46%	1.0%	47%	52%	2%
Southern Water	48%	52%	open	54%	45%	0.8%	47%	52%	1%
Thames Water	48%	52%	open	52%	48%	0.2%	52%	48%	0%
United Utilities	48%	52%	open	54%	45%	0.2%	50%	50%	0%
Wessex Water	48%	52%	open	53%	47%	0.4%	48%	52%	1%
Yorkshire Water	48%	52%	open	53%	47%	0.2%	48%	52%	0%

S2. Please select your gender. Base: ALL (9508)

England & Wales 2021 census regional age profile was applied to company quotas.

For individual water company profiling, we suggest combining 18-24 and 25-34 age groups into one subgroup for Hafren Dyfrdwy and Wessex Water to balance the sampling profile.

AGE BY WATER COMPANY Row %	TARGET						ACHIEVED UNWEIGHTED %						ACHIEVED WEIGHTED %					
	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+
Affinity Water	10%	18%	18%	17%	15%	22%	3%	16%	16%	18%	18%	28%	5%	20%	16%	20%	17%	23%
Anglian Water including Hartlepool	11%	15%	15%	16%	17%	26%	6%	18%	17%	19%	19%	21%	7%	19%	13%	14%	22%	25%
Bristol Water	10%	15%	15%	16%	17%	28%	8%	17%	16%	18%	18%	23%	7%	16%	16%	17%	19%	26%
Cambridge Water	9%	16%	16%	17%	16%	25%	8%	22%	20%	18%	15%	17%	8%	18%	20%	14%	16%	25%
Dŵr Cymru Welsh Water	10%	15%	15%	16%	17%	27%	6%	16%	18%	17%	18%	25%	7%	19%	13%	18%	19%	24%
Essex and Suffolk Water	10%	18%	18%	17%	15%	22%	7%	16%	19%	18%	17%	24%	7%	20%	19%	18%	14%	22%
Hafren Dyfrdwy	11%	16%	15%	16%	16%	25%	2%	18%	17%	17%	18%	29%	3%	21%	18%	16%	16%	26%
Northumbrian Water	11%	15%	15%	16%	17%	25%	6%	17%	16%	17%	19%	24%	6%	19%	12%	15%	22%	26%
Portsmouth Water	10%	16%	17%	17%	16%	25%	5%	17%	19%	14%	18%	28%	6%	20%	21%	13%	16%	25%
SES Water	11%	19%	18%	17%	15%	20%	2%	11%	20%	19%	21%	27%	8%	24%	20%	14%	15%	19%
Severn Trent Water	11%	16%	16%	17%	16%	24%	5%	19%	19%	20%	19%	18%	5%	19%	18%	18%	21%	19%
South East Water	10%	16%	17%	17%	16%	25%	5%	17%	18%	18%	17%	26%	5%	17%	18%	20%	17%	23%
South Staffs Water	11%	17%	16%	17%	16%	24%	11%	18%	17%	18%	18%	18%	7%	21%	16%	17%	21%	19%
South West Water including Bournemouth	10%	15%	15%	16%	17%	28%	4%	14%	16%	18%	18%	30%	5%	20%	14%	17%	17%	27%
Southern Water	10%	16%	17%	17%	16%	25%	5%	17%	18%	16%	18%	25%	5%	20%	17%	17%	16%	24%
Thames Water	11%	19%	18%	17%	15%	20%	9%	19%	20%	18%	16%	18%	9%	19%	20%	18%	16%	18%
United Utilities	11%	17%	16%	17%	16%	24%	7%	18%	18%	18%	18%	21%	6%	17%	15%	18%	20%	24%
Wessex Water	10%	15%	15%	16%	17%	28%	4%	15%	16%	18%	18%	30%	4%	21%	16%	15%	17%	27%
Yorkshire Water	11%	17%	16%	17%	16%	24%	8%	14%	17%	19%	17%	25%	6%	12%	15%	19%	19%	28%

S1. How old are you? Base: ALL (9508)

2021 Census Approximated Social Grade figures* were applied to company quotas.

For individual water company profiling, we suggest combining AB and C1 into one subgroup for Cambridge Water & SES Water. And combine C2 and DE into one subgroup for Dŵr Cymru Welsh Water to balance the sampling profile.

SOCIAL GRADE BY WATER COMPANY Row %	TARGET				ACHIEVED UNWEIGHTED %				ACHIEVED WEIGHTED %			
	AB	C1	C2	DE	AB	C1	C2	DE	AB	C1	C2	DE
Affinity Water	27%	33%	19%	21%	35%	31%	16%	17%	30%	30%	19%	21%
Anglian Water including Hartlepool	25%	31%	21%	23%	29%	26%	19%	25%	28%	27%	20%	25%
Bristol Water	28%	34%	22%	16%	34%	32%	16%	18%	28%	34%	18%	21%
Cambridge Water	24%	30%	21%	25%	26%	33%	14%	27%	33%	21%	23%	23%
Dŵr Cymru Welsh Water	21%	30%	23%	25%	24%	31%	18%	28%	21%	31%	17%	32%
Essex and Suffolk Water	27%	33%	19%	21%	31%	32%	17%	20%	29%	31%	19%	21%
Hafren Dyfrdwy	22%	30%	23%	26%	24%	31%	20%	25%	26%	26%	21%	27%
Northumbrian Water	21%	28%	22%	29%	30%	33%	17%	20%	19%	29%	22%	30%
Portsmouth Water	26%	36%	20%	18%	39%	28%	14%	19%	29%	32%	19%	19%
SES Water	28%	35%	18%	19%	29%	30%	16%	24%	38%	25%	18%	19%
Severn Trent Water	24%	31%	22%	23%	31%	33%	17%	19%	26%	27%	19%	27%
South East Water	26%	36%	20%	18%	38%	32%	14%	16%	31%	31%	17%	21%
South Staffs Water	22%	30%	22%	26%	27%	31%	16%	27%	25%	27%	19%	28%
South West Water including Bournemouth	28%	34%	22%	16%	31%	35%	16%	18%	29%	33%	20%	18%
Southern Water	26%	36%	20%	18%	31%	33%	15%	20%	30%	32%	17%	22%
Thames Water	28%	35%	18%	19%	32%	35%	14%	20%	32%	35%	14%	20%
United Utilities	21%	33%	20%	26%	28%	34%	16%	22%	25%	32%	19%	25%

Q11: Please indicate which one of the following best describes the profession of the chief income earner in your household. & Q12: You said that the chief income earner in your household was retired. Which of the following best describes the previous occupation of the chief income earner in your household before retirement? Base: ALL (9508)

*https://www.mrs.org.uk/pdf/JICPOPS%20regional%20evaluation%20of%20Census%202021%20ASG.pdf

Feasibility by sample source differed by each water company. There was a cap of ~375 set for a panel source to ensure a robust proportion from the push-to-web sample.

SAMPLE SOURCE BY WATER COMPANY Row %	ACHIEVED N		ACHIEVED UNWEIGHTED ROW %		ACHIEVED WEIGHTED ROW %	
	Online	Push-to-web	Online	Push-to-web	Online	Push-to-web
Affinity Water	377	88	81%	19%	66%	34%
Anglian Water including Hartlepool	378	110	77%	23%	64%	36%
Bristol Water	358	144	71%	29%	64%	36%
Cambridge Water	140	311	31%	69%	64%	36%
Dŵr Cymru Welsh Water	375	136	73%	27%	64%	36%
Essex and Suffolk Water	371	134	73%	27%	64%	36%
Hafren Dyfrdwy	69	449	13%	87%	40%	60%
Northumbrian Water	373	131	74%	26%	64%	36%
Portsmouth Water	259	245	51%	49%	64%	36%
SES Water	108	405	21%	79%	64%	36%
Severn Trent Water	375	105	78%	22%	75%	25%
South East Water	374	146	72%	28%	64%	36%
South Staffs Water	300	220	58%	42%	64%	36%
South West Water including Bournemouth	375	141	73%	27%	64%	36%
Southern Water	377	111	77%	23%	64%	36%
Thames Water	373	140	73%	27%	72%	28%
United Utilities	374	126	75%	25%	68%	32%
Wessex Water	375	126	75%	25%	64%	36%
Yorkshire Water	371	138	73%	27%	64%	36%

SOURCE: Panel vs Push-to-web (i.e., database of customers of individual water companies)

The overall sample was weighted using household connection figures*.

RESEARCHED WOCS AND WASCS %	HH CONNECTION TARGET	ACHIEVED UNWEIGHTED %	ACHIEVED WEIGHTED %
Affinity Water + Anglian Water	1%	2%	1%
Affinity Water + Thames Water	5%	3%	5%
Anglian Water	8%	5%	8%
Bristol Water + Wessex Water	2%	5%	2%
Cambridge + Anglian Water	1%	4%	1%
Dŵr Cymru Welsh Water	5%	6%	5%
Essex and Suffolk Water + Anglian Water	2%	4%	2%
Essex and Suffolk Water + Thames Water	1%	2%	1%
Hafren Dyfrdwy	0.40%	2%	0.19%
Hafren Dyfrdwy + Dŵr Cymru Welsh Water	0.01%	3%	0.19%
Northumbrian Water	5%	5%	5%
Portsmouth Water + Southern Water	1%	5%	1%
SES + Thames Water	1%	6%	1%
Severn Trent Water	14%	5%	14%
South East Water + Southern Water	3%	4%	3%
South East Water + Thames Water	1%	2%	1%
South Staffs Water + Severn Trent Water	2%	6%	2%
South West Water	4%	5%	4%
Southern Water	4%	5%	5%
Thames Water	15%	6%	16%
United Utilities	13%	5%	13%
Wessex Water	2%	5%	2%
Yorkshire Water	9%	5%	9%

*Connections as at 31st March 2024, provided by CCW

COMPARISON OF THE DRAFT DETERMINATION SURVEY WITH COMPANY BUSINESS PLAN SURVEYS

IMPACT

FROM INSIGHT TO INFLUENCE

Making comparisons with water company business plan research

- This survey followed the same research guidance that water companies used to test customer views on their business plan proposals. The questions and order of the questions were the same with some small differences to reflect that this research was about Ofwat's Draft Determinations rather than water company business plan proposals.

The responses that can be directly compared are:

- Ease of affordability for current and proposed water bills
- Acceptability of the investment proposals. This is the first of the two acceptability questions, and it asks people to think only about the proposals for investment and say how acceptable or unacceptable they are (Q8).
- Reasons for finding the plan acceptable/unacceptable – a new response code was added around trust in Ofwat and codes tweaked where appropriate to reflect the Draft /determination context. However, this should still be broadly comparable.

The responses that are not comparable:

- Preferences for investment areas as companies tested their own versions and combinations of these for their business plan research.
- The second acceptability question which reminded people of the bill proposals before asking them about acceptability again. This question was not in the survey which companies did about their business plan proposals.

There is a caution on comparisons for all questions because of differences in the research approach:

- Water company business plan surveys used a fully push-to-web methodology, i.e. fresh samples drawn randomly from water company customer databases, sent an email or letter with an invite to take the survey online or by phone for a paper copy.
- The Draft Determination survey used a mix of push-to-web and an online panel sample. The push-to web sample saw a proposed bill based on their own bill as a starting point. The online panel sample saw a proposed bill using the average household water bill as a starting point. The online panel sample may have different characteristics in how they respond because they are not drawn randomly and are used to taking surveys.
- We do not know the extend of any weighting used with the water company samples in their business plan surveys – which could affect the comparisons we can make.
- Also, time has passed since then, so the timing may make a difference. Draft Determination surveys took place around a year after the company business plan surveys.

Draft Determination responses for proposed water bills compared to business plan responses: the overall picture is that the ease of affordability of Draft Determination proposals is better than for business plans.

For Portsmouth Water and Dŵr Cymru Welsh Water, more customers say the proposed Draft Determination bills will be more difficult to afford than the Business Plan bills.

DD VS. BP AFFORDABILITY SUMMARY Row %	DD: NET EASY	BP: CUSTOMERS EXPECTING TO FIND IT EASY TO PAY	DIFFERENCE	DD: NET DIFFICULT	BP: CUSTOMERS EXPECTING TO FIND IT DIFFICULT TO AFFORD TO PAY	DIFFERENCE
SES Water	36%	13%	24%	29%	48%	-19%
Bristol Water	34%	16%	17%	33%	47%	-14%
Portsmouth Water	33%	25%	8%	37%	28%	9%
Wessex Water	32%	16%	17%	31%	46%	-15%
South East Water	32%	16%	17%	38%	46%	-8%
Affinity Water	31%	17%	14%	30%	43%	-13%
South West Water	27%	16%	11%	40%	49%	-9%
Northumbrian Water	26%	14%	12%	37%	50%	-12%
Thames Water	26%	16%	10%	43%	50%	-7%
Severn Trent Water	26%	11%	14%	40%	53%	-12%
Anglian Water	26%	19%	6%	39%	42%	-3%
United Utilities	26%	15%	11%	38%	48%	-10%
South Staffs Water	25%	11%	14%	43%	50%	-7%
Yorkshire Water	24%	17%	8%	42%	45%	-3%
Dŵr Cymru Welsh Water*	23%	15%	7%	48%	47%	1%
Southern Water	20%	11%	8%	49%	54%	-5%
Hafren Dyfrdwy	19%	12%	7%	48%	51%	-3%
Cambridge Water	34%	not available	not available	35%	not available	not available
Essex and Suffolk Water	29%	not available	not available	40%	not available	not available

DD: Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base: ALL (9508)
BP: Acceptability and Affordability business plan research findings summary provided by CCW
* Dŵr Cymru Welsh Water tested their business plan twice. In October 2023 and then in January 2024 (as they had to update their plan with new investments and needed to test it again. The figures here are from January 2024.

Draft Determination responses for the acceptability of investment proposals compared to business plan responses: acceptability has improved with the exception of Dŵr Cymru Welsh Water, Hafren Dyfrdwy, Portsmouth Water and South East Water.

DD VS. BP ACCEPTABILITY SUMMARY Row %	DD: NET ACCEPTABLE	BP: % HHOLD CUSTOMERS FINDING BUSINESS PLAN IS ACCEPTABLE	DIFFERENCE	DD: NET UNACCEPTABLE	BP: % HHOLD CUSTOMERS FINDING BUSINESS PLAN IS UNACCEPTABLE	DIFFERENCE
Severn Trent Water	81%	72%	8%	8%	10%	-2%
Wessex Water	79%	58%	21%	13%	29%	-16%
Bristol Water	79%	73%	6%	15%	16%	-1%
United Utilities	78%	70%	8%	15%	16%	-1%
Affinity Water	78%	72%	6%	12%	9%	3%
South Staffs Water	77%	70%	7%	13%	12%	0%
Northumbrian Water	77%	71%	6%	12%	13%	-1%
Yorkshire Water	76%	72%	4%	14%	18%	-4%
Dŵr Cymru Welsh Water*	76%	81%	-5%	15%	8%	7%
Anglian Water	75%	69%	6%	15%	17%	-1%
South West Water	73%	57%	16%	18%	29%	-11%
SES Water	71%	66%	5%	15%	12%	3%
Hafren Dyfrdwy	70%	72%	-2%	18%	15%	3%
Portsmouth Water	70%	75%	-5%	20%	16%	4%
Thames Water	68%	62%	6%	20%	21%	-1%
South East Water	67%	68%	-1%	22%	15%	6%
Southern Water	65%	44%	20%	24%	43%	-19%
Cambridge Water	79%	not available	not available	13%	not available	not available
Essex and Suffolk Water	78%	not available	not available	12%	not available	not available

DD: Q8 Based on everything you have seen and read about this proposal for your water and sewerage services, how acceptable or unacceptable is it to you? Base: ALL (9508)

BP: Acceptability Affordability BP summary provided by CCW

* Dŵr Cymru Welsh Water tested their business plan twice. In October 2023 and then in January 2024 (as they had to update their plan with new investments and needed to test it again.

ADDITIONAL MODELING

CCW wanted to explore creating a model that estimates how customers perceive affordability for bill amounts not included in the survey.

This could help water companies make more accurate decisions when planning bill increases that are different from those tested.

IMPACT

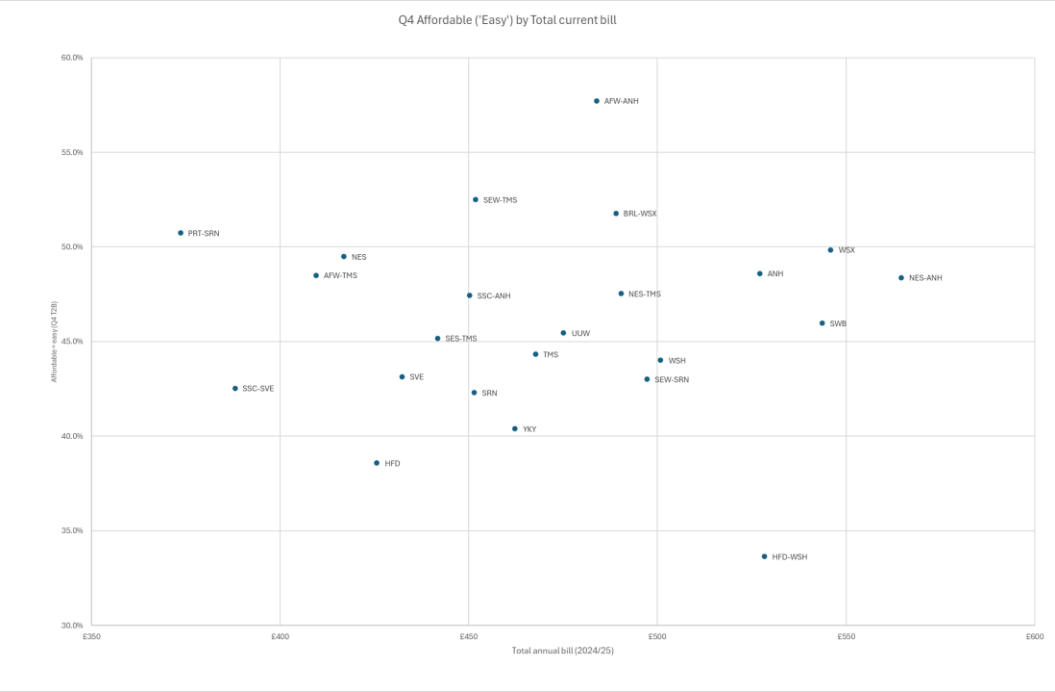
FROM INSIGHT TO INFLUENCE

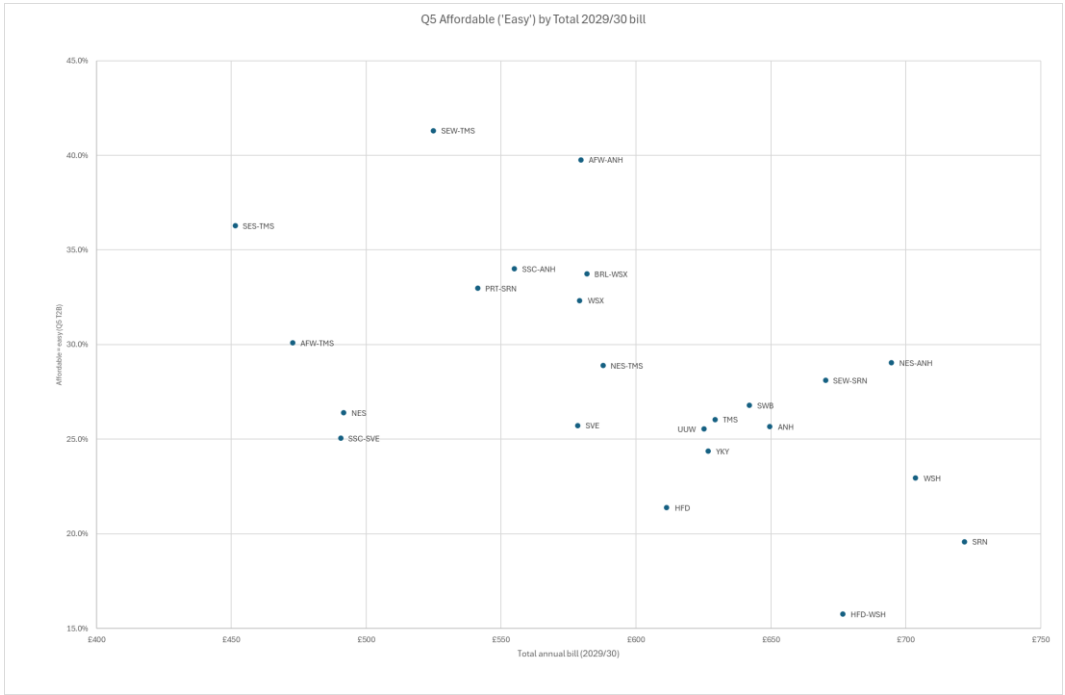
A PRELIMINARY MODEL OF AFFORDABILITY IN RELATION TO BILL (1)

The survey responses regarding the ease with which customers can pay their bills, both now and in the future, we influenced by the bill levels shown to them, both for the current time and in five years' time.

CCW requested that Impact explore the relationship between bill value and customer affordability to determine the feasibility of developing a model that would provide estimates of customers' perceived affordability of bill amounts not tested in the survey. This would allow a more precise assessment of the final determinations for companies who may go on to plan different bill increases from those tested in the survey.

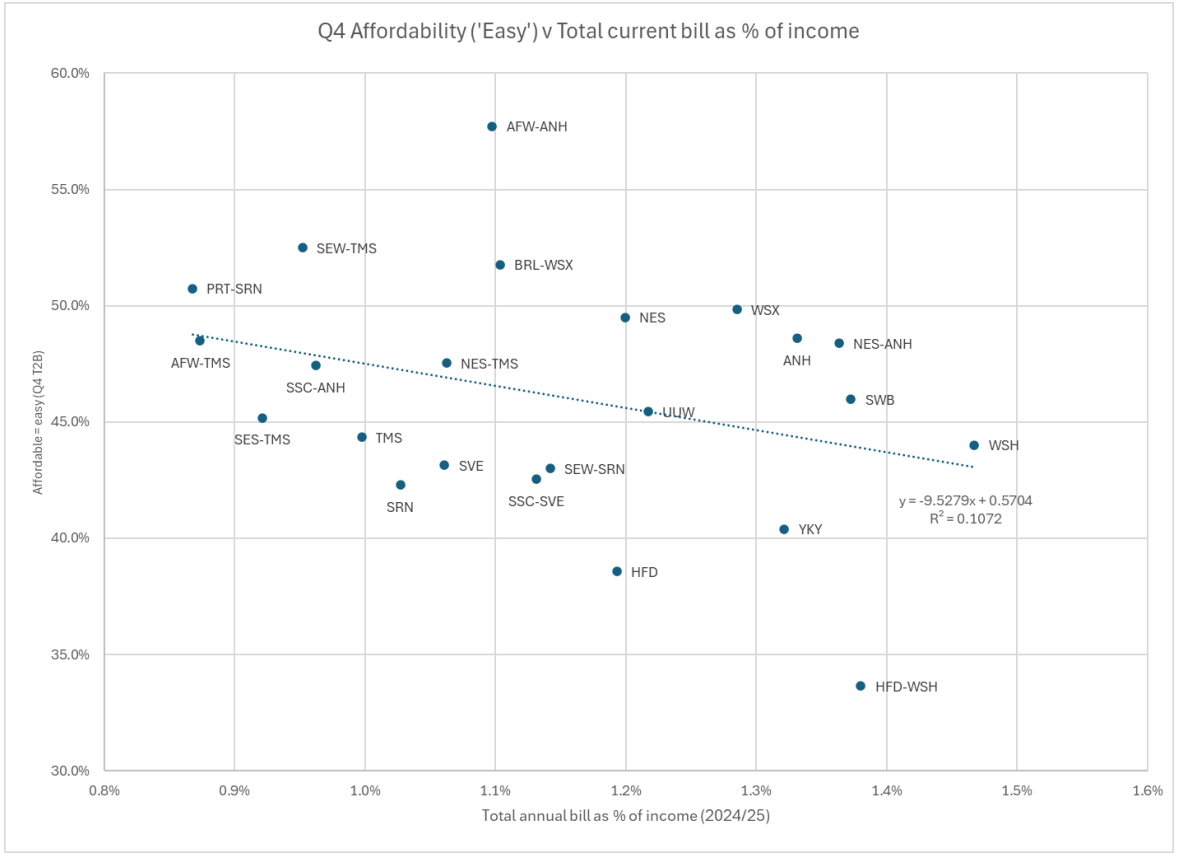
To begin with, there was near to no strong relationship between stated affordability (the % saying it would be 'easy' to pay the bill) and the bill level presented in the survey (each data point is a water company), as illustrated below.

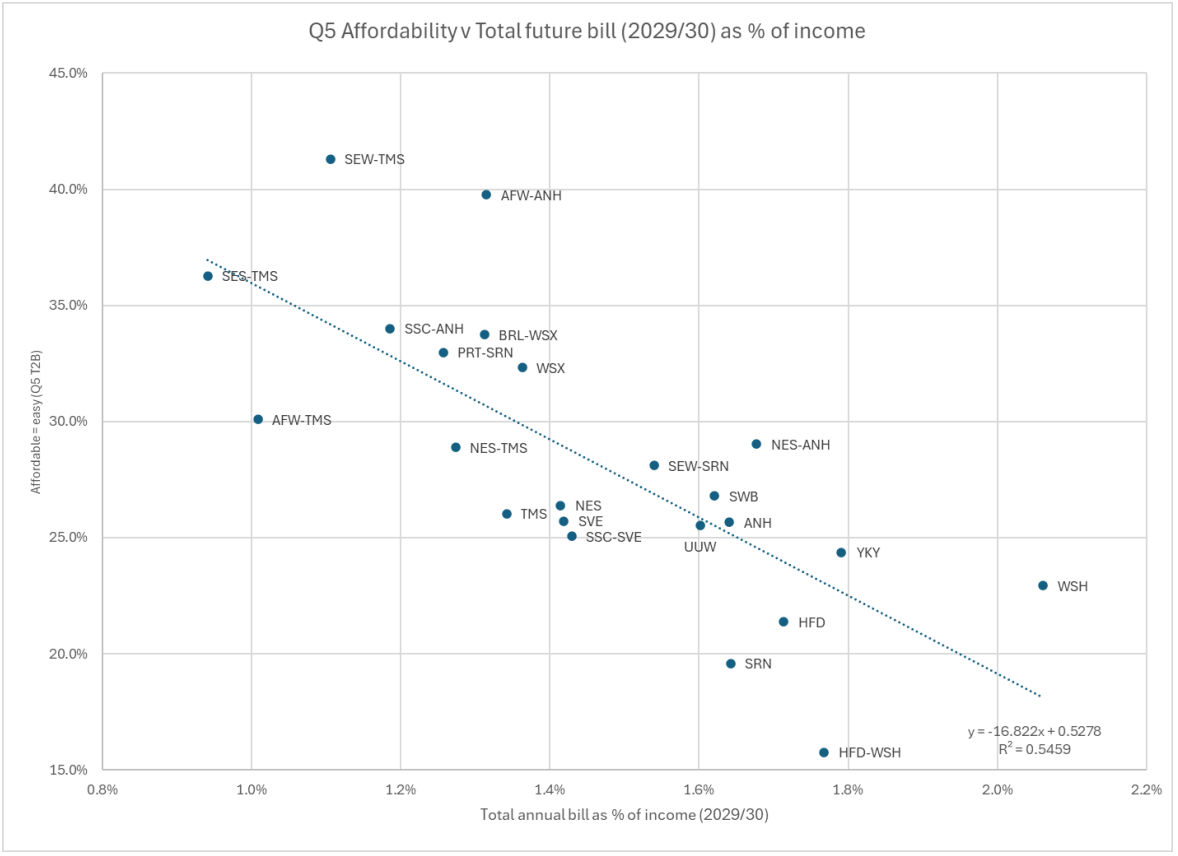




A PRELIMINARY MODEL OF AFFORDABILITY IN RELATION TO BILL (2)

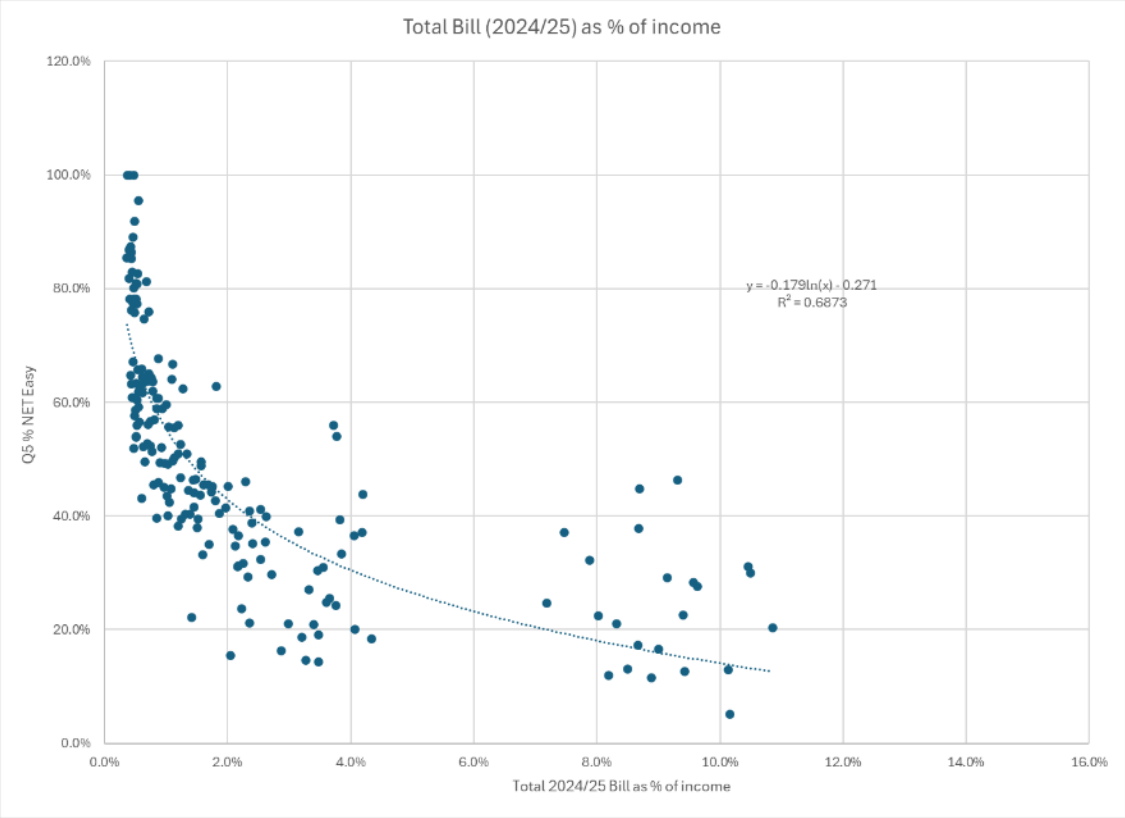
As the demographic profile of customers varied across companies, the next step was to represent bills as a proportion of reported income, so as to even out the disparity by water company region. The result was a more identifiable relationship between affordability and bill, particularly for future bills, as illustrated below:

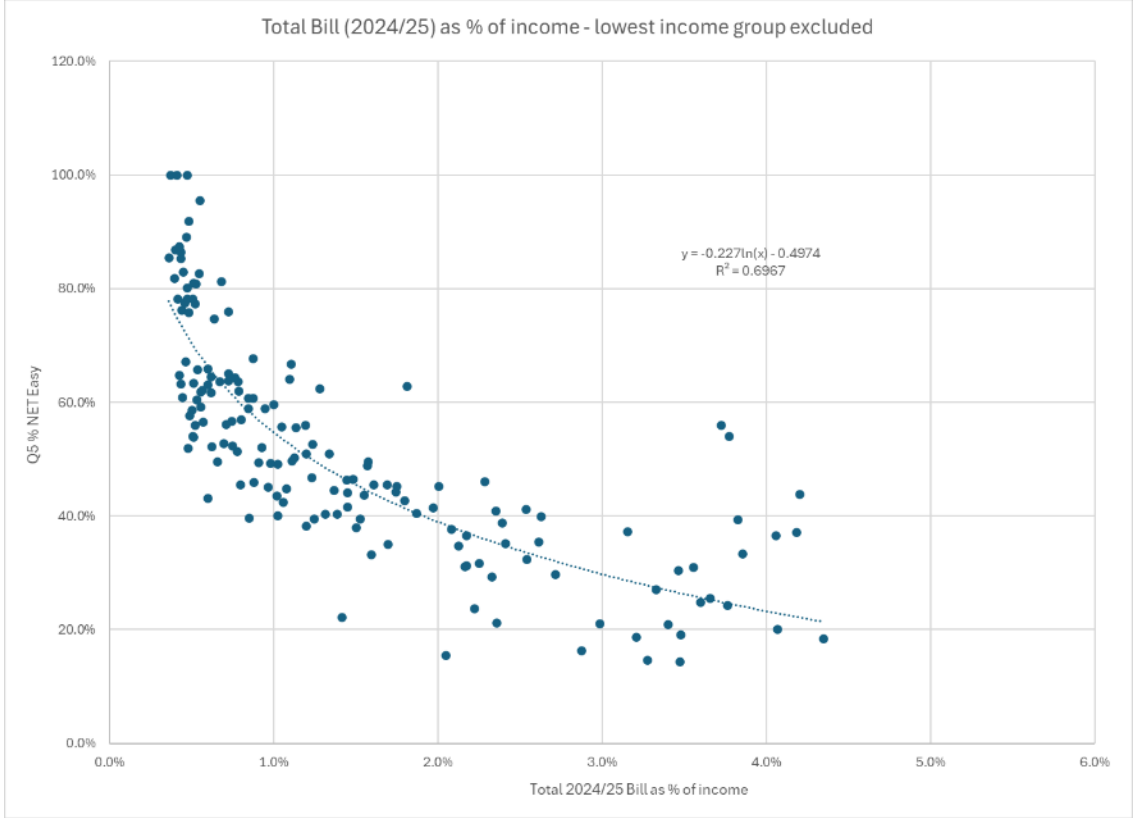




A PRELIMINARY MODEL OF AFFORDABILITY IN RELATION TO BILL (3)

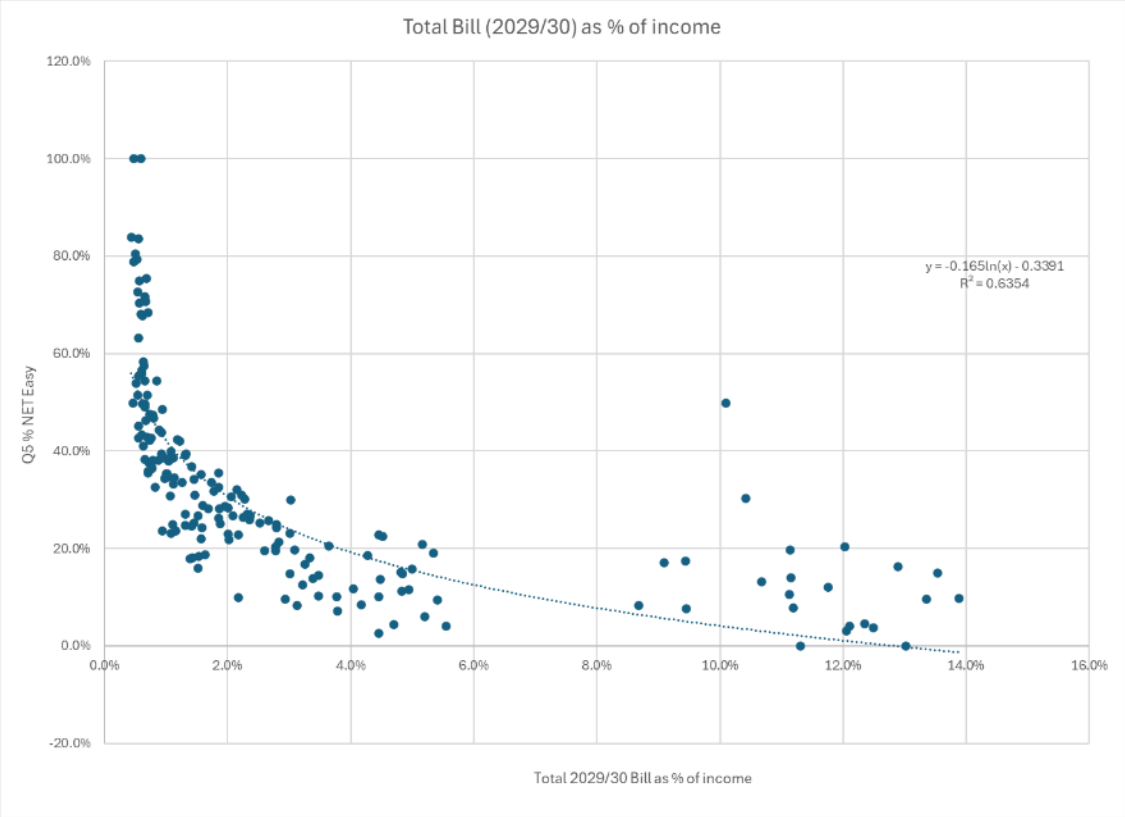
To explore the potential relationship of affordability to bill as a proportion of stated income, the results were further split by reported income band within each company. Because the lowest income band contained a large proportion of customers on social tariffs, these were omitted, because they distorted the model, as illustrated here for current bills:

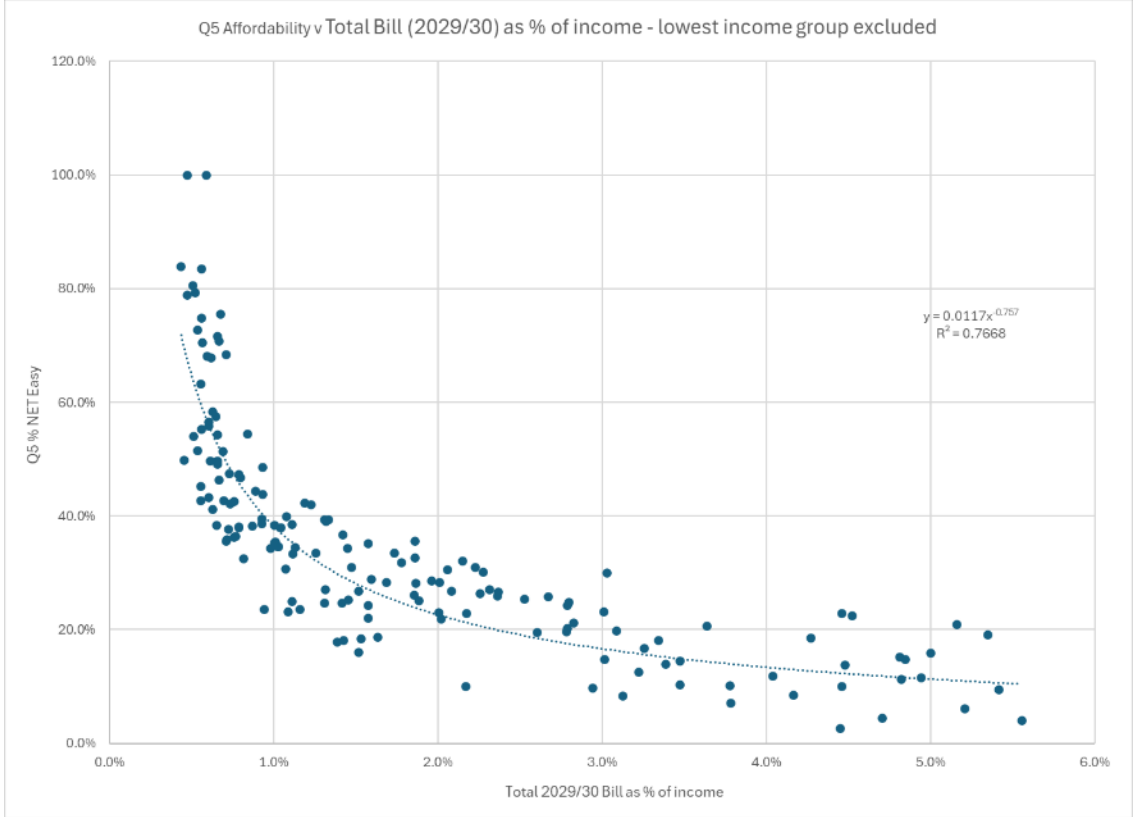




A PRELIMINARY MODEL OF AFFORDABILITY IN RELATION TO BILL (4)

Modelling of the future bills (2029/30) indicated an even stronger relationship:





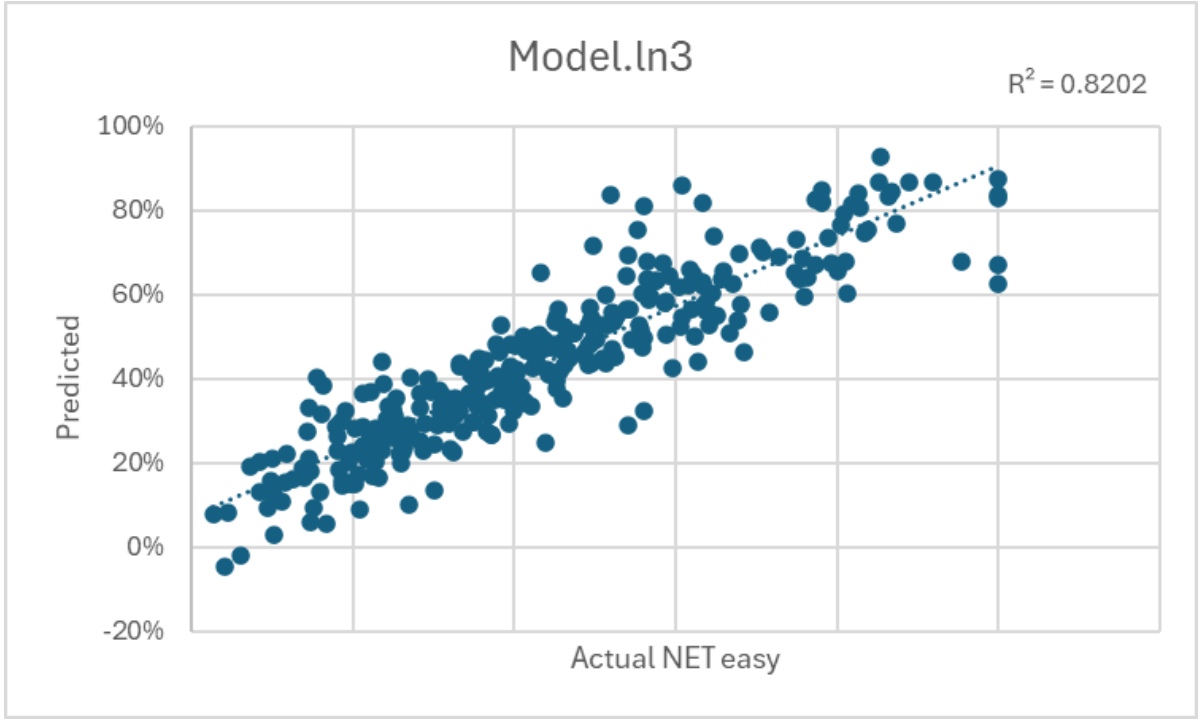
A PRELIMINARY MODEL OF AFFORDABILITY IN RELATION TO BILL (5)

A model developed from both the 2024/25 and 2029/30 data combined indicated a reasonable level of predictive power.

When used to 'predict' the actual NET 'easy' responses (the proportion per company saying that paying bills was 'very easy' and 'fairly easy'), the mean percentage error for current bills was +/-7% and for 2029/30 bills was +/-9%.

For example, if the model predicted that 50% of customers would find a 29/30 bill easy to afford, we would be confident that the actual stated value would lie in the range of 45% to 55% (+/-9% around 50%)

3 of the 23 water/wastewater company combinations exceeded a +/20% percentage error, indicating that further model refinement would be desirable.



Our conclusion from this work is that a predictive model of the relationship between affordability and bill level is a realistic endeavour. Future refinements could include additional explanatory factors (e.g., other demographics) and data drawn from affordability research undertaken by individual water companies.

To answer this objective, we suggest adding price sensitivity questions in the next survey.

INVESTMENT PRIORITIES AND INTERGENERATIONAL FAIRNESS

IMPACT

FROM INSIGHT TO INFLUENCE

For those who want the bill increase to start sooner to spread bill increases over a longer period, 'reducing the use of storm overflows which release sewage into rivers' is more important, whilst those who wish the increase to begin later put more importance on 'monitoring river quality' compared to the views for England and Wales combined.

Billpayers in Wales show no significant difference from the views of England and Wales combined.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

IMPROVING SEWERAGE SERVICES AND THE ENVIRONMENT Col %	TOTAL			AN INCREASE STARTING LATER, PUTTING MORE OF THE INCREASES ONTO LATER GENERATIONS OF YOUNGER AND FUTURE BILL-PAYERS			AN INCREASE IN BILLS STARTING SOONER, SPREADING INCREASES OVER THE LONGER TERM, AND OVER MORE GENERATIONS OF BILL-PAYERS		
	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES
Base size	9508	8479	1029	2260	2050	210	4071	3634	437
Improving sewage treatment processes to help river water quality	42%	42%	46%	44%	44%	48%	42%	42%	47%
Reducing the use of storm overflows which release sewage into rivers	38%	38%	41%	35% ↓	35% ↓	38%	41% ↑	41% ↑	45%
Monitoring river water quality	9%	9%	8%	12% ↑	12% ↑	12%	8%	8%	7%
Increasing the capacity of sewage treatment works	4%	4%		4%	4%		5%	5%	
Thames Tideway Tunnel	1%	1%		2%	2%		1%	2%	
Additional septic tank treatment facilities	0%		0%	0%		0%	0%		0%
Don't know/can't say	5%	5%	5%	3% ↓	3% ↓	2%	2% ↓	2% ↓	1% ↓

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7a: Based on what you have just read, which of these is the most important to you relating to improving sewerage services and the environment?
ALL (9508), ENGLAND (8479), WALES (1029).

For those who want the increase to start sooner, 'Fitting smart water meters' is more important than the Views in England and Wales. Those who wish for the increase to start later place more importance on 'starting to develop large-scale water supply schemes'.

In Wales, both subgroups recognise the greater importance of 'Developing new sources of water'.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

PRIORITIES: PROTECTING WATER SUPPLIES Col%	TOTAL			AN INCREASE STARTING LATER, PUTTING MORE OF THE INCREASES ONTO LATER GENERATIONS OF YOUNGER AND FUTURE BILL-PAYERS			AN INCREASE IN BILLS STARTING SOONER, SPREADING INCREASES OVER THE LONGER TERM, AND OVER MORE GENERATIONS OF BILL-PAYERS		
	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES
Base size	9508	8479	1029	2260	2050	210	4071	3634	437
Reducing leakage	50%	50%	56%	48%	48%	52%	49% ↓	48% ↓	56%
Starting to develop large scale water supply schemes	20%	21%		19%	19%		23% ↑	24% ↑	
Fitting smart water meters	15%	15%	14%	20% ↑	20% ↑	16%	16%	16%	15%
Improving water supply	4%	5%		5%	5%		4%	4%	
Building water supply connections in the company area	3%	4%		4%	4%		4%	4% ↑	
Developing new sources of water	1%		24%	1%		26% ↑	2%		27% ↑
Reducing demand for water	1%	2%		1%	1%		2%	2%	
Better management of water use	0%		2%	0%		2% ↑	0%		2% ↑
Don't know/can't say	4%	4%	5%	2% ↓	2% ↓	4%	1% ↓	1% ↓	0% ↓

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7b Based on what you have just read, which of these is the most important to you relating to protecting water supplies? BASE: ALL (8330)
* Better management of water use' is an option that was only seen in Wales. It's similar to 'Reducing demand for water'. We kept it separate.

Both subgroups, place more importance on ‘additional water treatment processes’.

Billpayers in Wales show no significant difference from the views of England and Wales combined.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

PRIORITIES: IMPROVING DRINKING WATER QUALITY Col %	TOTAL			AN INCREASE STARTING LATER, PUTTING MORE OF THE INCREASES ONTO LATER GENERATIONS OF YOUNGER AND FUTURE BILL-PAYERS			AN INCREASE IN BILLS STARTING SOONER, SPREADING INCREASES OVER THE LONGER TERM, AND OVER MORE GENERATIONS OF BILL-PAYERS		
	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES
Base size	8990	8479	511	2154	2050	104	3864	3634	230
Replacement of lead supply pipes	56%	56%	55%	55%	55%	48%	57%	57%	55%
Additional water treatment processes	38%	38%	40%	42% ↑	42% ↑	47%	40% ↑	40%	42%
Don’t know/can’t say	6%	6%	6%	3% ↓	3% ↓	5%	3% ↓	3% ↓	3%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7c Based on what you have just read, which of these is the most important to you relating to improving drinking water quality? Base: ALL EXCEPT HAFREN DYFRDWY, TOTAL (7929), ENGLAND (7465), WALES (464)

*Hafren Dyfrdwy were only shown ‘the Replacement of lead supply pipes’ investment, therefore, the importance question was irrelevant.

For those who want the increase to start sooner, 'Improving security and resilience to cyber attacks' is more important, whilst those who wish the increase to begin later put more importance on 'Improving the resilience of treatment works, pipes and technology' compared to the views for England and Wales combined.

Billpayers in Wales show no significant difference from the views of England and Wales combined.

INVESTMENTS SHADED IN BLUE WERE SHOWN FOR ALL WATER COMPANIES

PRIORITIES: IMPROVING THE RESILIENCE OF SERVICES TO DISRUPTION FROM EXTERNAL EVENTS Col %	TOTAL			AN INCREASE STARTING LATER, PUTTING MORE OF THE INCREASES ONTO LATER GENERATIONS OF YOUNGER AND FUTURE BILL-PAYERS			AN INCREASE IN BILLS STARTING SOONER, SPREADING INCREASES OVER THE LONGER TERM, AND OVER MORE GENERATIONS OF BILL-PAYERS		
	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES	TOTAL	ENGLAND	WALES
Base size	9508	8479	1029	2260	2050	210	4071	3634	437
Improving the resilience of treatment works, pipes and technology	84%	84%	83%	83%	83%	79%	88% ↑	88% ↑	87%
Improving security and resilience to cyber attacks	10%	10%	11%	14% ↑	14% ↑	17%	10%	10%	11%
Don't know/can't say	6%	6%	5%	3% ↓	3% ↓	3%	2% ↓	2% ↓	2%

Arrows next to the numbers mark significant differences from the Total, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q7d Based on what you have just read, which of these is the most important to you relating to improving the resilience of pipes, sewers and treatment works to reduce the risk of disruption to services? Base: ALL (9508), ENGLAND (8479), WALES (1029)

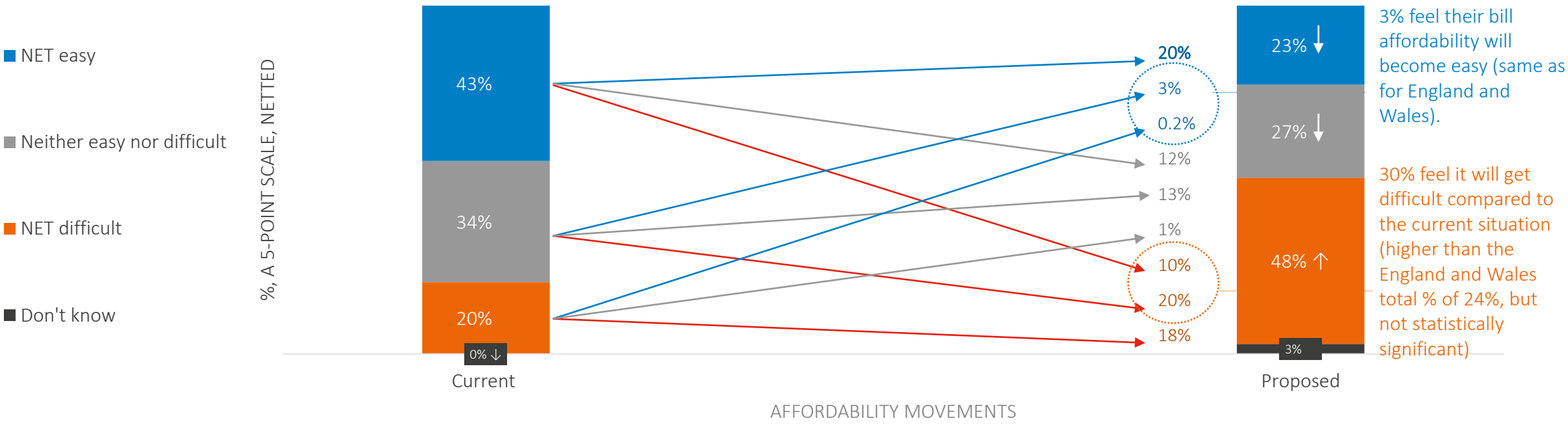
ADDITIONAL ANALYSIS FOR WALES

FROM INSIGHT TO INFLUENCE

Q7a Based on what you have just read, which of these is the most important to you relating to improving sewerage services and the environment? by Company (single) Base: ALL (9508)

In Wales, affordability of the proposed water bill drops to 23% from the current 43% (vs. the England and Wales drop to 26% from the current 45%).

WALES: CURRENT VS. PROPOSED WATER BILL AFFORDABILITY MOVEMENTS



3% feel their bill affordability will become easy (same as for England and Wales).

30% feel it will get difficult compared to the current situation (higher than the England and Wales total % of 24%, but not statistically significant)

Arrows next to the numbers mark significant differences between Current & Proposed affordability, ↑ = significantly more ↓ = significantly less on a 95% confidence level.

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base ALL WALES (1029)
Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills? Base ALL WALES (1029)

Wales: Billpayer characteristics:

In Wales, the groups who don't find the current bill difficult but say the proposed bill will be difficult to afford are more among billpayers with medical vulnerabilities, among the White and Black Caribbeans, or those who feel their financial situation will worsen heading towards 2030.

	Characteristics of the 30% who find current water bill *easy*, or *neither easy nor difficult* to afford, but their proposed water bill *difficult*. (291)	Characteristics of the 3% who find current water bill *difficult* or *neither easy nor difficult* to afford, but their proposed water bill *easy*. The base size of this group (28) is too low to run this analysis
Demographics	Significantly less among AB social economic grade AB.	N/A
Vulnerability	More so among those with medical vulnerabilities.	N/A
Income		N/A
Ethnicity	More so among the White and Black Caribbeans and less so among African ethnic groups.	N/A
Last year bill payments	Less so among those living comfortably or doing all right.	N/A
Financial condition & outlook	Heading towards 2030, they feel their financial situation will worsen.	N/A
Metered water		N/A
Social tariff & IMD Quintiles *		N/A

Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Base: ALL WALES (1029)
* Directional as only some push-to-web participants were identified if on social tariff or allocated to IMD quintiles

IMPACT

FROM INSIGHT TO INFLUENCE